

HRMS End User Training



**Basic: Employee Hiring & Processing
Training Guide**

Course Objectives

Upon completion of this course, you will be able to:

- Understand the key components and terms of Personnel Administration.
- Hire and rehire an employee using Human Resource Management System (HRMS).
- Display and change employee information.
- Process an Employee Appointment Change.
- Process a Leave of Absence.
- Perform an Employee Separation.
- Process a Change of Status.



Personnel Administration Overview

Personnel Administration Overview

- Upon completion of this section, you will be able to:
 - Explain the Personnel Administration components.
 - Define Personnel Administration roles as they relate to the course.
 - Identify other HRMS modules that share integration with Personnel Administration components.

Key Terms

Integration

The ability to share data with other HRMS components.

Effective Dating

This is the date which data on the infotype becomes valid. It is based upon a valid start and end date.

Infotype

This is a screen that is used to enter employee information and to group related data fields together.



Key Terms – cont'd

Personnel Action

Processes used to record personnel actions such as hiring, appointment change or separation.

Transaction

How you will access the employees' record to view or update. All transactions have transaction codes to access the employee's record.



Personnel Administration Roles

- An end users position determines what role is assigned and the level of HRMS access available.
- The following roles exist for Personnel Administration:

Personnel Administrator Processor	Creates and maintains employee new hire and rehire information, appointment changes, separations, extended leave of absences and runs reports.
Personnel Administrator Inquirer	Views employee's information once entered into HRMS.
Personnel Administrator Supervisor	Provides oversight for the Personnel Administration Processor and Inquirer as well as running reports.

Integration With Other HRMS Components

- HRMS is an *integrated* system, with the ability to shared data with other HRMS components.
- It allows real-time transmission from Personnel Administration to:
 - Organizational Management
 - Personnel Administration
 - Payroll
 - Benefits
 - Time Management
- Information provided during hiring is transferred to payroll in real-time, qualifying a new employee for immediate payroll processing.
 - Department of Enterprise Services recommends entries in HRMS be completed **BEFORE** DAY 3 of the [Payroll Processing Cycle](#).

Effective Dating

- HRMS allows you to enter an “effective date” when creating infotype records.
- You can enter information into HRMS at any time, before or after the employee information changes.
- The effective date is based upon a valid start date and a valid end (delimit) date.

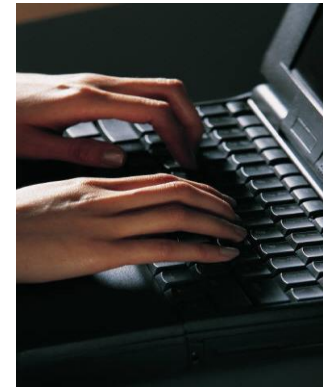
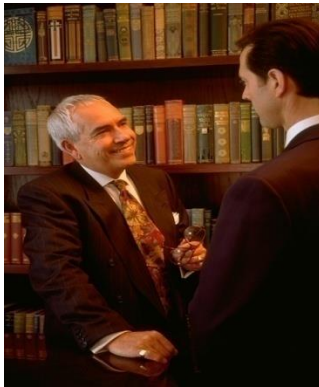
Note: The end date might default to 12/31/9999. Verify the desired end date prior to saving the action.



Effective Dating Example

June 5th – Marsha, the Personnel Administration Processor, receives notification of Kevin's retirement scheduled for July 31st

June 1st – Kevin gives a letter to his immediate supervisor that outlines a retirement date of July 31st



June 8th – Marsha enters Kevin's retirement into HRMS to become effective on July 31st



July 31st – Kevin retires with no data entry needed as HRMS activates retirement based on effective data entered on June 8th

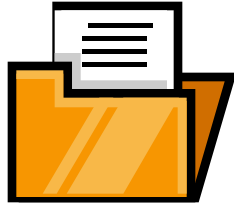
Effective Dating – New Hires and Appointment Changes

Use CAUTION when using effective dating on New Hires and Appointment Changes.

- Although effective dating is beneficial to agencies, be aware that back-dating could adversely affect other components in HRMS.
- If the employee did not start on the date that was entered into HRMS, there are procedures in the OLQR that outline specific scenarios.
 - By back-dating an employee's personnel action it can cause complications in payroll if it has been processed and even if the employee has no earnings for that pay period.

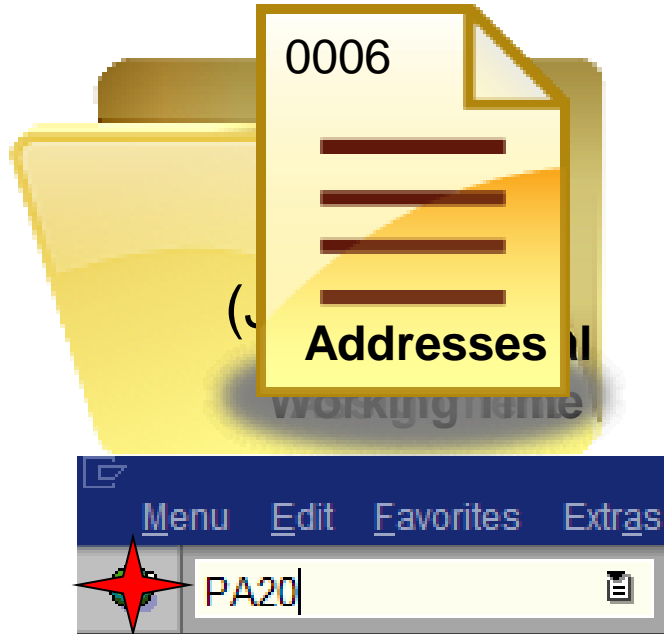
Infotypes

- An **infotype** is a screen within a transaction in which specific criteria is entered into individual employee files or records.



- Infotypes are like documents in an employee's (electronic) personnel file.
- The infotypes are guided by your assigned role and are determined by the action you are performing.
- During a **personnel action**, infotypes are grouped together to help navigate from screen to screen.
 - Therefore, there is no need to worry about missing required data fields.

Infotype Examples



Personnel Actions

- Personnel actions are processes used to record personnel events such as hiring, appointment change or separation.
- Each personnel action contains a set or group of infotypes that record all the information necessary for an event to be recorded.
- For example, the New Hire action contains linked infotypes that walk you through entry of employee information.
 - Infotypes you access display in consecutive order until all required data is entered.



Accessing Personnel Actions

- The menu of *Personnel Actions (PA40)* allows you to choose the action you want to complete.
- The action you choose prompts you to complete the required information for that action.

The screenshot shows a software interface for 'Personnel Actions'. At the top is a menu bar with options: HR Master Data, Edit, Goto, Extras, Utilities, Settings, System, and Help. Below the menu bar is a toolbar with various icons. The main title 'Personnel Actions' is displayed in a blue header. Below the header, there are input fields for 'Personnel no.' and 'From'. The main content area contains a table titled 'Personnel Actions' with columns: Action Type, Personn..., EE group, and EE subgr... The table lists various actions such as New Hire, Change of Status, Concurrent Employment, Appointment Change, Quick Hire, Rehire - Quick Hire, Separation, Rehire, Leave of Absence - Active, Leave of Absence - Inactive, and Return from Leave of Absence. A vertical scrollbar is visible on the right side of the table.

Action Type	Personn...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

Review Questions

1. What three roles are part of the Personnel Administration?

Personnel Administration Processor, Personnel Administration
Inquirer and Personnel Administration Supervisor

2. Each transaction is assigned a _____?

Transaction Code

3. This HRMS feature allows information to be entered into the system at any time by using a valid start and end (delimit) date.

Effective Dating

Display and Maintain Employee Master Data

Display and Maintain Employee HR Master Data Overview

Upon completion of this section, you will be able to:

- Describe the differences between the Display actions and the Maintain actions.
- Review the Display, Copy, and Change Functions and understand the importance of the information in each infotype.

Key Term

Master Data

This is essential personnel information that includes personal and organizational data which is unique to each employee.



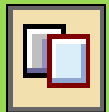
Function Keys



Create

- Creates a new infotype record

- Use the **Create** function when creating new infotypes outside of using personnel actions. Maintains data history.



Copy

- Creates a new infotype record

- Use the **Copy** function to 'copy' existing infotype records and make changes in the appropriate infotype fields. Maintains data history.

Function Keys – cont'd



Delimit

- End dates an infotype record

- Use the **Delimit** function to put a stop date on the record, but maintain the history of former records. Maintains data history.



Change

- Correcting errors

- Use the **Change** function to replace the previous infotype. Does not maintain data history.

Function Keys – cont'd



Display

- View an infotype

- Use the **Display** function to view one infotype at a time.



Overview

- Displays history of an infotype

- Use the **Overview** function to show a list of records created for an infotype.

Accessing Infotypes – Display and Maintain

- HRMS allows you to update infotypes while keeping a history to the infotype.
- There are two ways to update/maintain infotypes:
 - Maintain (**PA30**)
 - Update specific infotypes one at a time.
 - Personnel actions (**PA40**)
 - Use to process personnel actions such as a New Hire which groups the necessary infotypes needed to process the action.
- You can also view employee information:
 - Display (**PA20**)
 - View infotypes one at a time.
 - Personnel File (**PA10**)
 - View the entire employee's record.



HRMS Activity



Maintain Employee Master Data

Audit Tool:

Logged Changes in Infotype Data report

- Helps identify data changes according to personnel numbers, Infotype and/or date and time.
- Run this report daily as an audit resource tool.
- Refer to the OLQR User Procedure: [Logged changes in infotype data](#)
- Access the Logged Changes in Infotype Data by using the transaction code **S_AHR_61016380**

Review Questions

■ Match the icon to its function:



Change – To change the record with no history.



Overview – To view all actions associated with an infotype.



Copy – To update the record while keeping a history.

■ In most circumstances, should you use the Copy or Change action to update employee information?

New Hire

New Hire Overview

Upon completion of this section, you will be able to:

- Identify the structure of a personnel action.
- Navigate through the Employee Hiring infotypes and understand the importance of the information in each infotype.
- Complete a New Hire action in HRMS.

Key Terms

Personnel Number

The unique identifying number for an employee.

Reference Personnel Number

Is a link between two personnel numbers and allows the employee to share certain infotypes such as *Addresses* (0006).

Next Increase

This is the date of the next scheduled increase in pay. This is also known as the periodic increment date.



Personnel Number

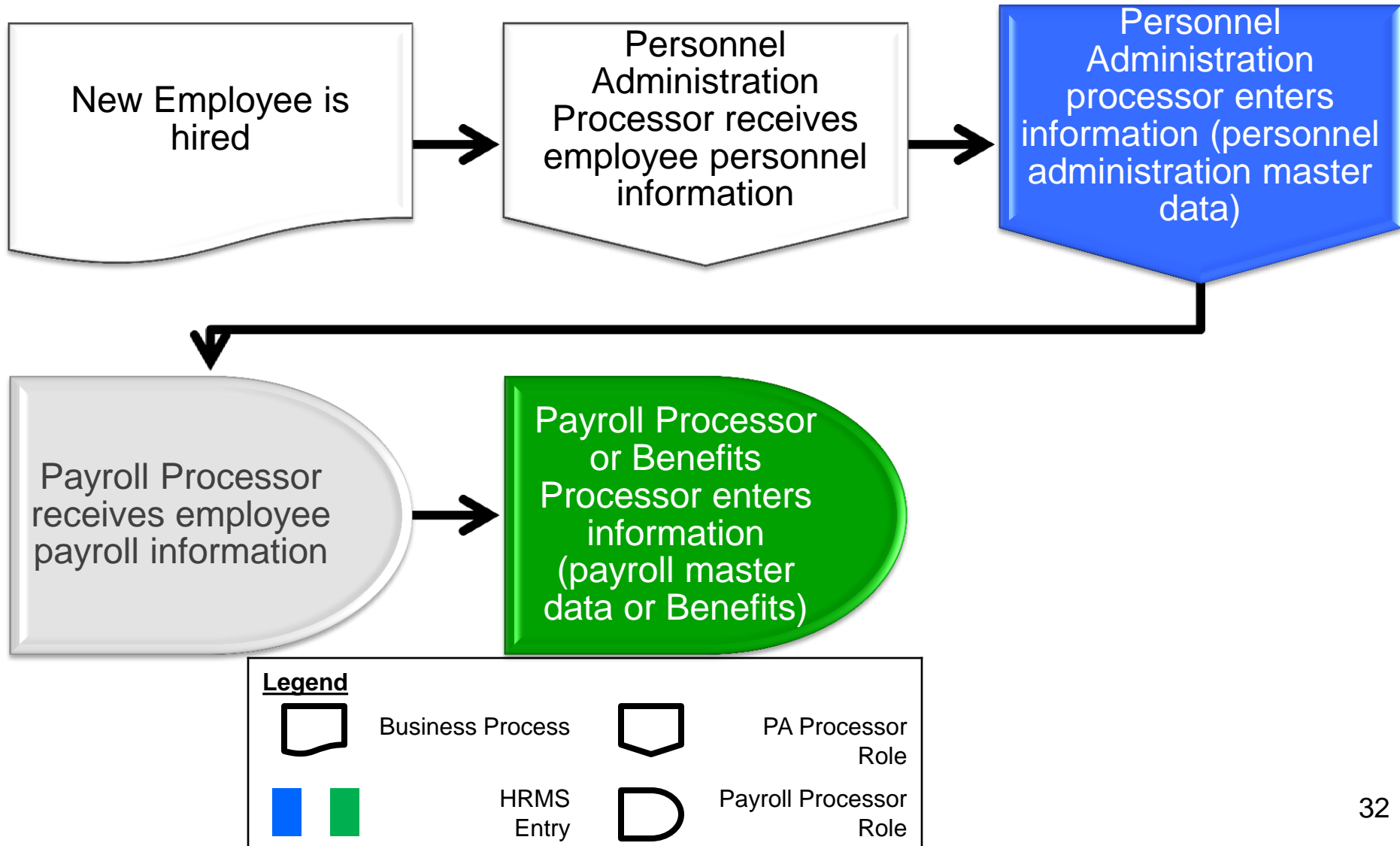
- **Personnel Numbers** are automatically assigned to an employee and they are never repeated. All previous employees prior to conversion have been assigned a Personnel Number through Data Warehouse or HRMS.
- New Employees are assigned new Personnel Numbers.
 - They have never worked for the State of Washington.
 - They were previously employed with the State of Washington, but prior to HRMS being implemented.

Note: Be sure to request a new hire check with the DES Service Center prior to entering a new hire into the system. This can be done by emailing servicecenter@des.wa.gov

Personnel Number – cont'd

- Employees may have two 'active' assigned personnel numbers simultaneously. This is known as concurrent appointment.
 - An employee works in more than one position at the same time in different agencies or personnel areas or works in more than one position in the same personnel area when one appointment is hourly and the other appointment is monthly. HRMS will assign a new personnel number for the employee's additional concurrent appointment.
- During a concurrent appointment the employee is assigned a Primary personnel number for one agency (or position) and a ****reference personnel number*** for the other.

New Hire Process Flow



Hire a New Employee

- Use the Hire action to enter information for an employee that does not already exist in HRMS.
- If the employee already has a personnel number in HRMS, use the Rehire action.
- If the employee already has a personnel number prior to HRMS you would use the New Hire action utilizing the personnel number for the employee.
- The Hire action moves you through each infotype which requires certain information to hire an employee.

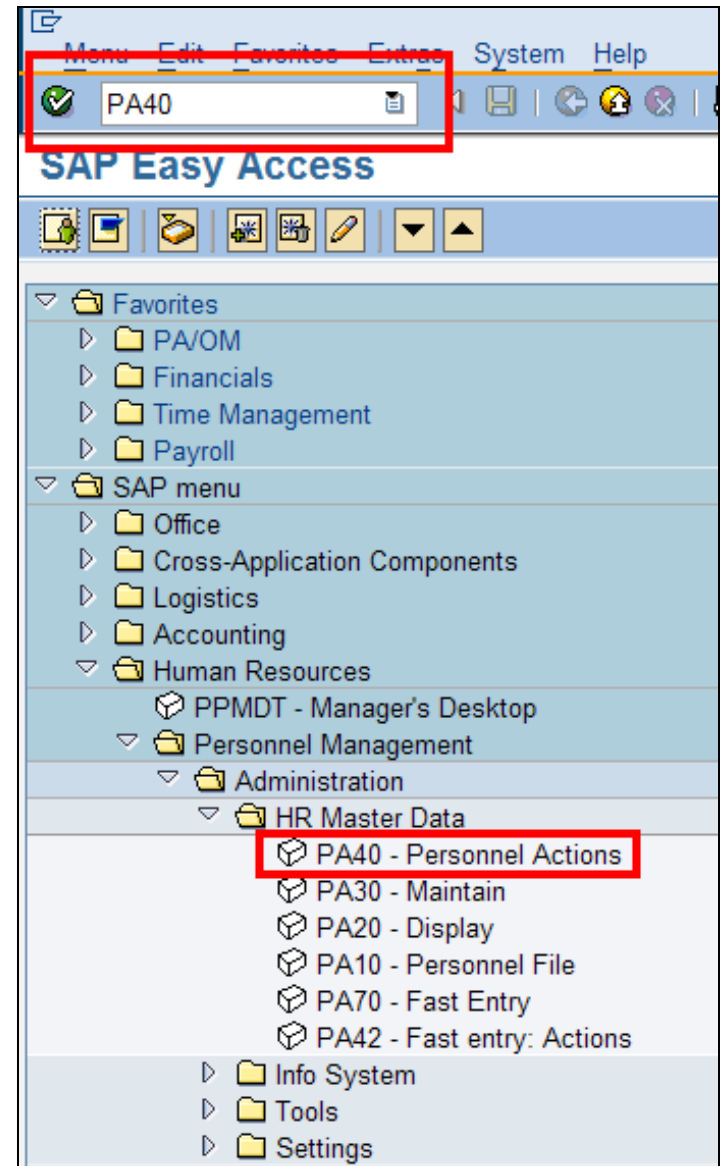


Hire Infotypes


- Create the following infotypes during the Hire action including:
 - *Actions (0000)*
 - *Personal Data (0002)*
 - *Organizational Assignment (0001)*
 - *Contract Elements (0016)*
 - *Monitoring of Tasks (0019)*
 - *Addresses (0006)*
 - *Planned Working Time (0007)*
 - *Education (0022)*
 - *Date Specifications (0041)*
 - *Additional Personal Data (0077)*
 - *Military Status (0081)*
 - *Create Time Specifications / Employment (0552)*
 - *Basic Pay (0008)*

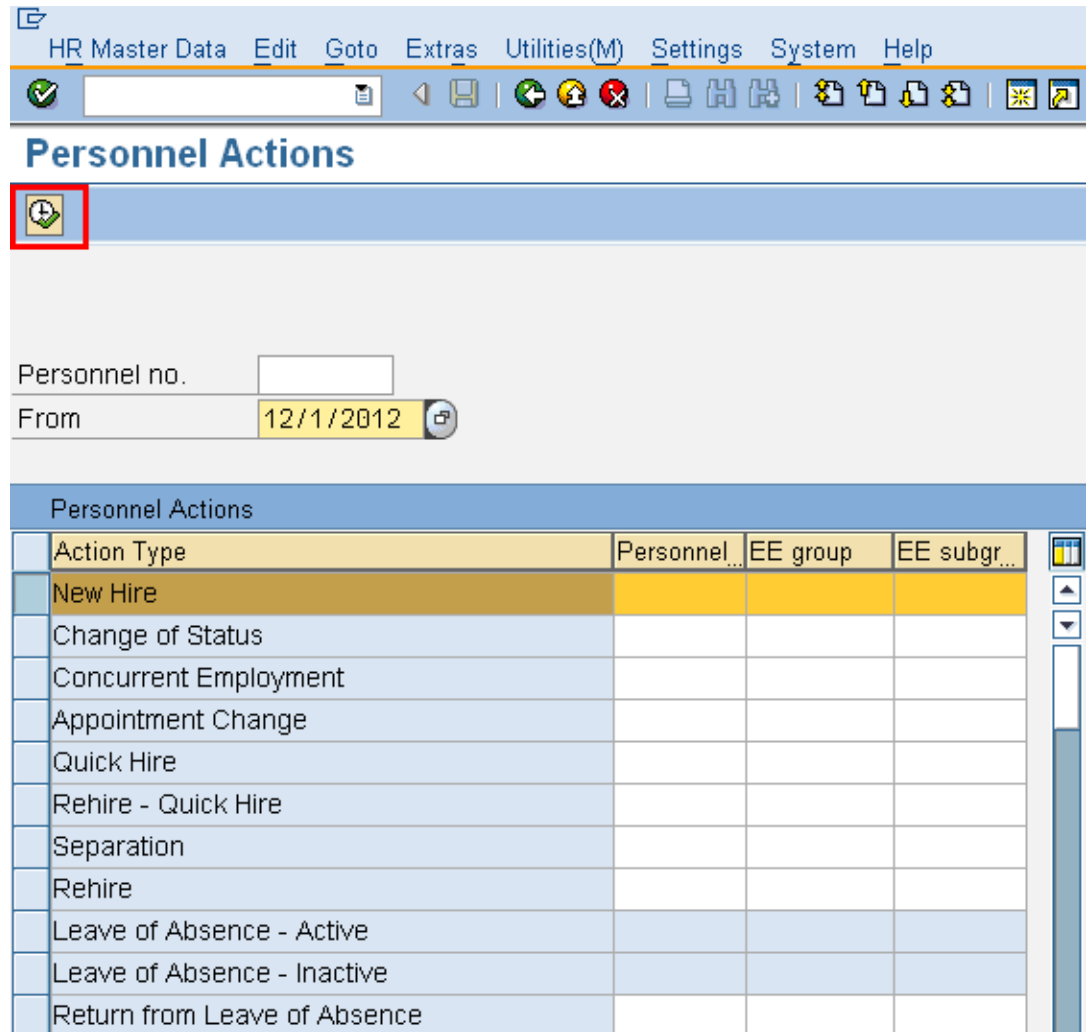
New Hire Action

- To create a Hire Action using the menu path:
 - Follow Human Resources
→ Personnel Management
→ Administration → HR
Master Data → Personnel
Actions
 - Or enter transaction code **PA40** in the **Command field**



New Hire Personnel Action

- During the hire action, the system assigns the new employee a unique number.
- Field to complete:
 - **From** (Date of Hire)
 - Example: 1/1/2015
- To access the Hire action, click the box to the left of New Hire.
- Click  (**Execute**) to execute the action.



HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions




Personnel no.

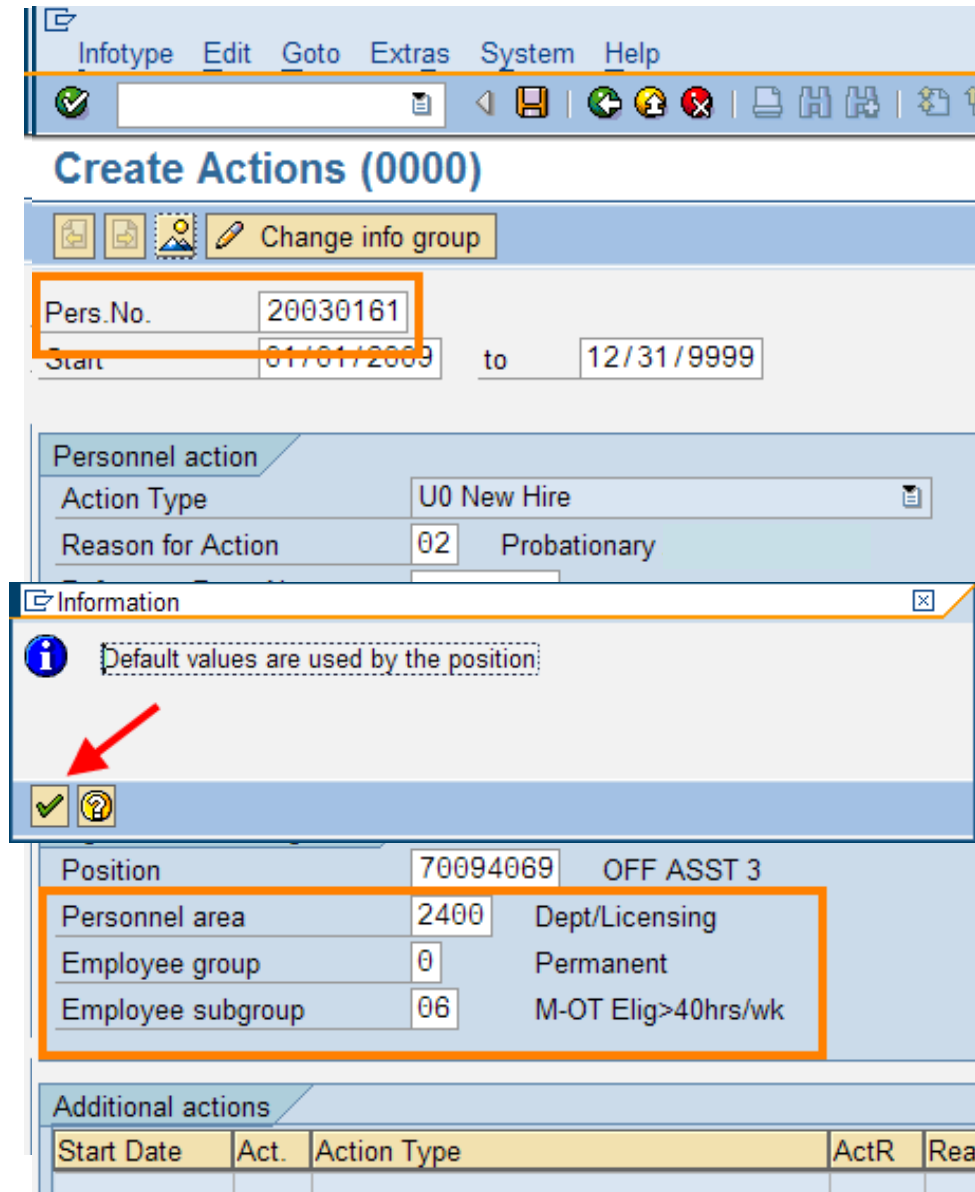
From 12/1/2012

Personnel Actions			
Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

Note: A personnel number is not required to complete the Hire action.

Actions (0000)

- The Actions infotype records the hire action reason position number for the employee.
- Fields to complete:
 - **Reason for Action** (use the matchcode)
 - **Position**
- Click  (**Enter**) to validate and populate the following fields:
 - **Personnel Area**
 - **Employee Group**
 - **Employee Sub-group**
- When finished, click  (**Enter**) and then click  (**Save**).



Infotype Edit Goto Extras System Help

Create Actions (0000)

Change info group

Pers.No. 20030161

Start 01/01/2009 to 12/31/9999



Personnel action

Action Type U0 New Hire

Reason for Action 02 Probationary

Information

Default values are used by the position

Position 70094069 OFF ASST 3

Personnel area 2400 Dept/Licensing

Employee group 0 Permanent

Employee subgroup 06 M-OT Elig>40hrs/wk

Additional actions



Start Date	Act.	Action Type	ActR	Rea

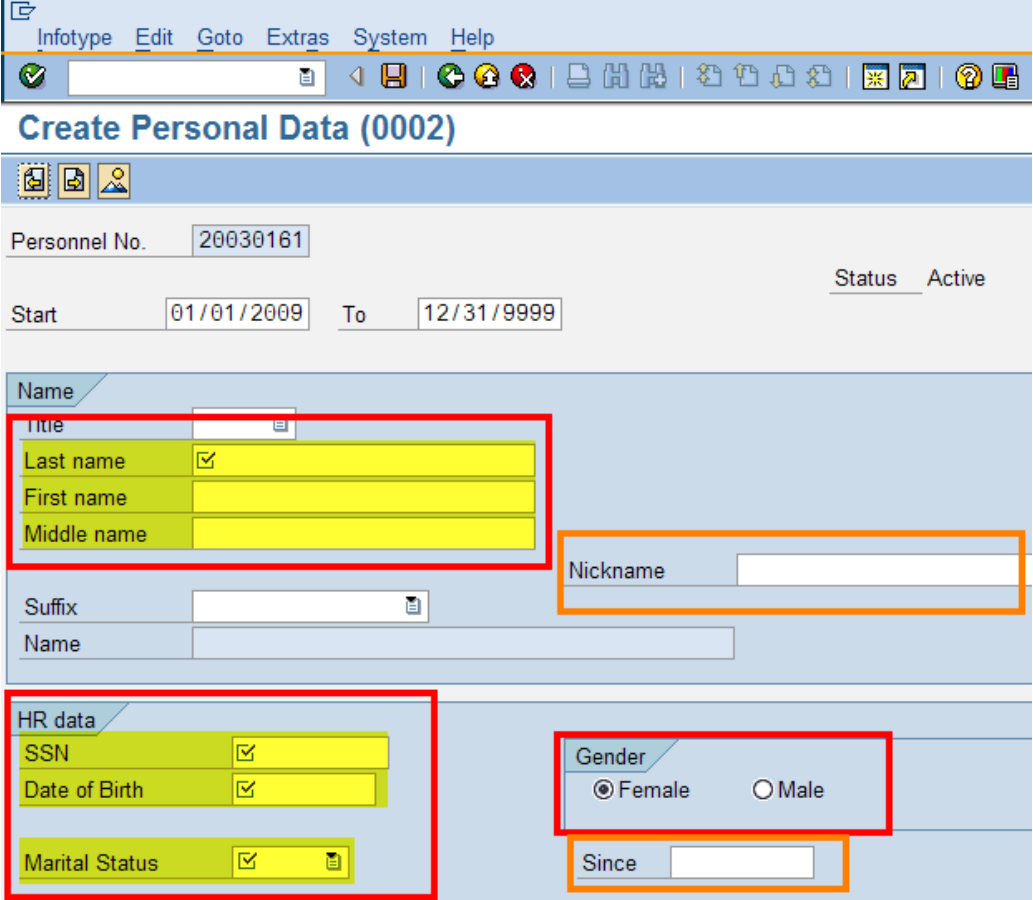
Personal Data (0002)

- The Personal Data infotype records data to identify an employee.

- Fields to complete:

- Last name
- First name
- Middle name (optional)
- SSN
- Date of birth
- Marital status
- Gender

- When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Create Personal Data (0002)

Personnel No. 20030161

Start 01/01/2009 To 12/31/9999

Status Active

Name

Title

Last name ☒

First name

Middle name

Nickname

Suffix

Name

HR data

SSN ☒

Date of Birth ☒

Marital Status ☒

Gender

☒ Female ☐ Male

Since

Organizational Assignment (0001)

■ The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.

■ Fields required to complete:

– **Contract**

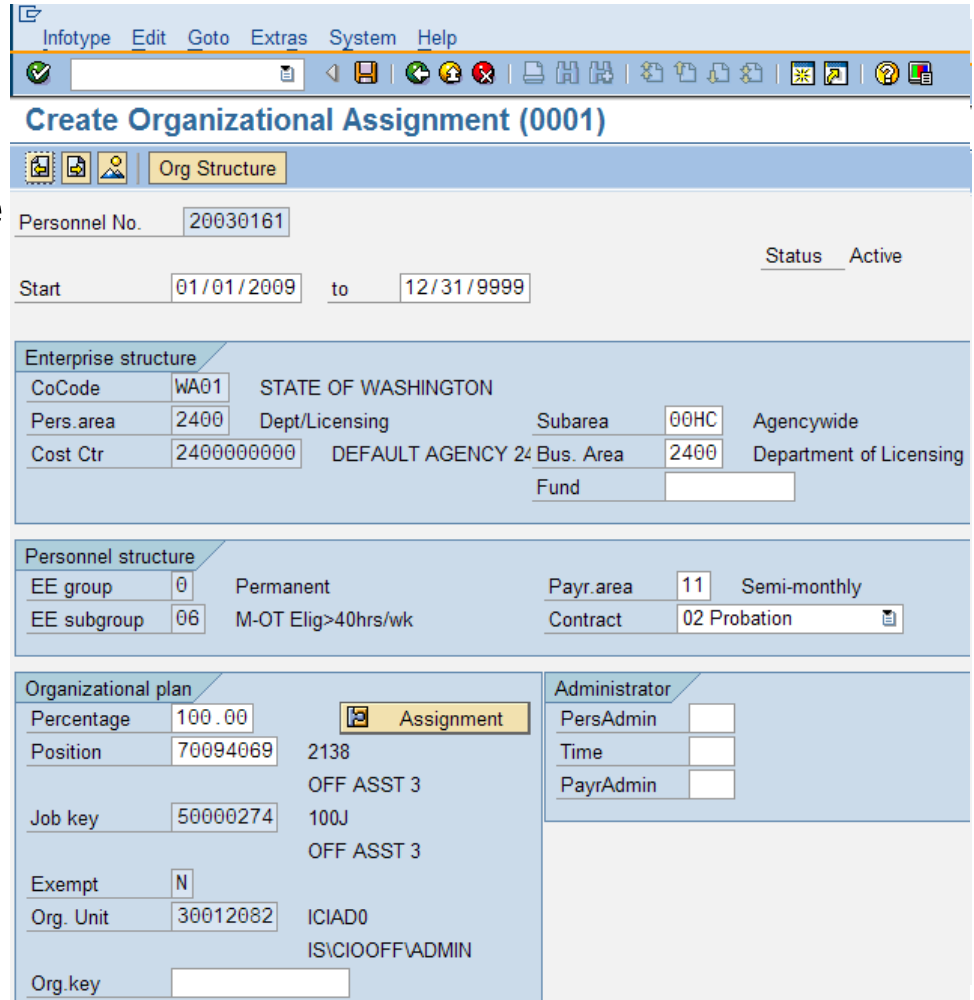
- Permanent (System Default)

■ Optional fields:

– **Org. key**

– **Administrator – Time**

■ When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the 'Create Organizational Assignment (0001)' form in SAP. The form is divided into several sections: 'Enterprise structure', 'Personnel structure', 'Organizational plan', and 'Administrator'. The 'Enterprise structure' section includes fields for 'CoCode' (WA01), 'STATE OF WASHINGTON', 'Pers.area' (2400), 'Dept/Licensing', 'Subarea' (00HC), 'Agencywide', 'Cost Ctr' (2400000000), 'DEFAULT AGENCY 24', 'Bus. Area' (2400), 'Department of Licensing', and 'Fund'. The 'Personnel structure' section includes fields for 'EE group' (0), 'Permanent', 'Payr.area' (11), 'Semi-monthly', 'EE subgroup' (06), 'M-OT Elig>40hrs/wk', 'Contract' (02 Probation), and a 'Contract' button. The 'Organizational plan' section includes fields for 'Percentage' (100.00), 'Position' (70094069), '2138', 'OFF ASST 3', 'Job key' (50000274), '100J', 'OFF ASST 3', 'Exempt' (N), 'Org. Unit' (30012082), 'ICIAD0', 'IS\ICIOFF\ADMIN', and 'Org.key'. The 'Administrator' section includes fields for 'PersAdmin', 'Time', and 'PayrAdmin'. There is also an 'Assignment' button in the 'Organizational plan' section.

Enterprise structure	
CoCode	WA01
Pers.area	2400
Cost Ctr	2400000000
STATE OF WASHINGTON	
Dept/Licensing	Subarea
DEFAULT AGENCY 24	00HC
Bus. Area	2400
Fund	
Agencywide	
Department of Licensing	

Personnel structure	
EE group	0
EE subgroup	06
Permanent	M-OT Elig>40hrs/wk
Payr.area	11
Contract	02 Probation
Semi-monthly	

Organizational plan	
Percentage	100.00
Position	70094069
Job key	50000274
Exempt	N
Org. Unit	30012082
Org.key	
2138	
OFF ASST 3	
100J	
OFF ASST 3	
ICIAD0	
IS\ICIOFF\ADMIN	

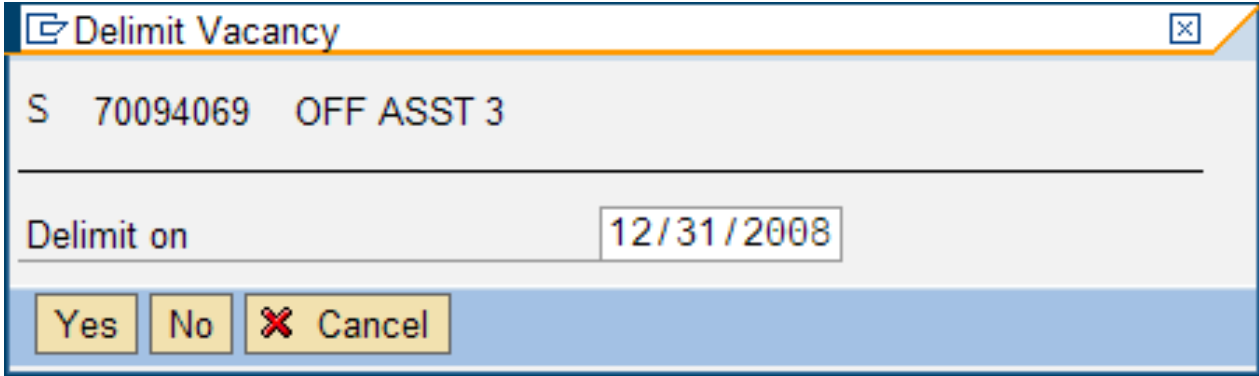
Administrator	
PersAdmin	
Time	
PayrAdmin	

Delimit Vacancy

A feature used to report vacant positions. Information will be updated on the *Position Vacancy* infotype located in Organizational Management.



- This popup window will appear if the position is vacant or if multi-filled.
- Click 'Yes' to delimit the vacancy.
- Click 'No' to not delimit the vacancy.

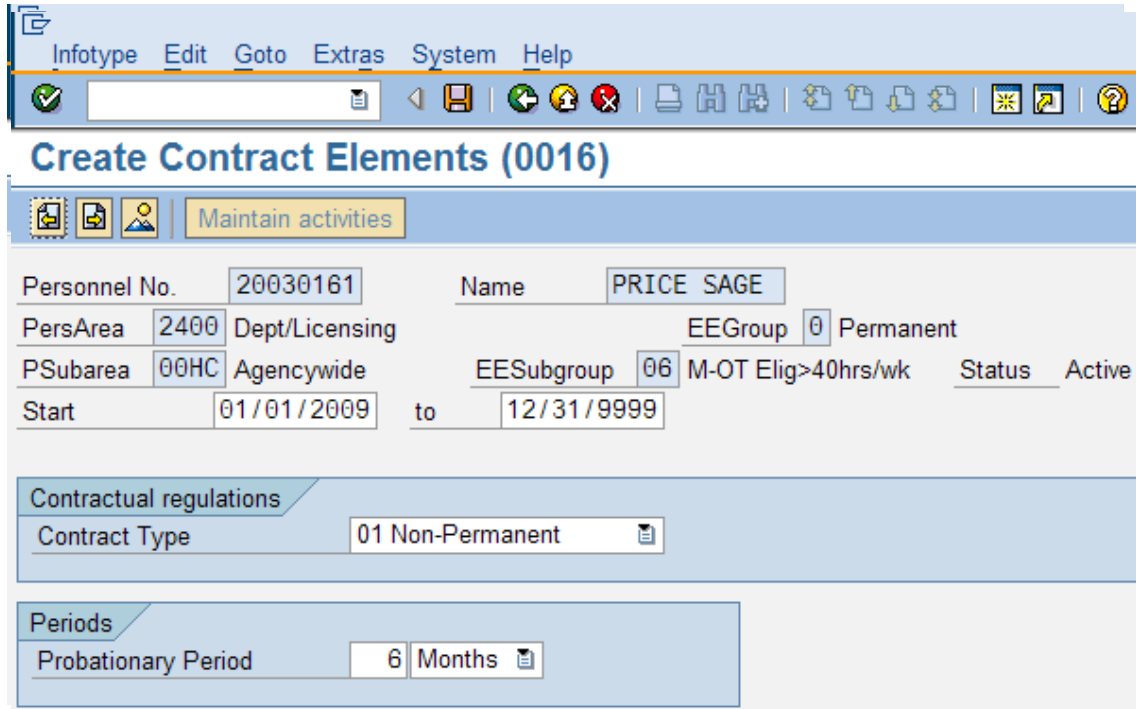
Note: If the position is multi-filled select 'No'.



The screenshot shows a dialog box titled "Delimit Vacancy". Inside the dialog, the text "S 70094069 OFF ASST 3" is displayed. Below this, there is a label "Delimit on" followed by a date input field containing "12/31/2008". At the bottom of the dialog, there are three buttons: "Yes", "No", and "Cancel". The "Cancel" button has a red 'X' icon next to it.

Contract Elements (0016)

- The Contract Elements infotype tracks an employee's state status (permanent or non-permanent).
- Field required to complete:
 - **Contract type**
- Optional field:
 - Probationary period
- When finished, click  (Enter) and then click  (Save).



The screenshot shows the 'Create Contract Elements (0016)' form in SAP. The menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The title bar is 'Create Contract Elements (0016)'. Below the title bar is a 'Maintain activities' button. The form contains several input fields: 'Personnel No.' (20030161), 'Name' (PRICE SAGE), 'PersArea' (2400), 'Dept/Licensing' (EEGroup 0), 'PSubarea' (00HC), 'Agencywide' (EESubgroup 06), 'M-OT Elig>40hrs/wk' (Status Active), 'Start' (01/01/2009), and 'to' (12/31/9999). Below these fields is a section for 'Contractual regulations' with a 'Contract Type' dropdown set to '01 Non-Permanent'. At the bottom is a 'Periods' section with a 'Probationary Period' dropdown set to '6 Months'.

Personnel No.	20030161	Name	PRICE SAGE
PersArea	2400	Dept/Licensing	EEGroup 0 Permanent
PSubarea	00HC	Agencywide	EESubgroup 06 M-OT Elig>40hrs/wk
Status	Active	Start	01/01/2009 to 12/31/9999



Contractual regulations

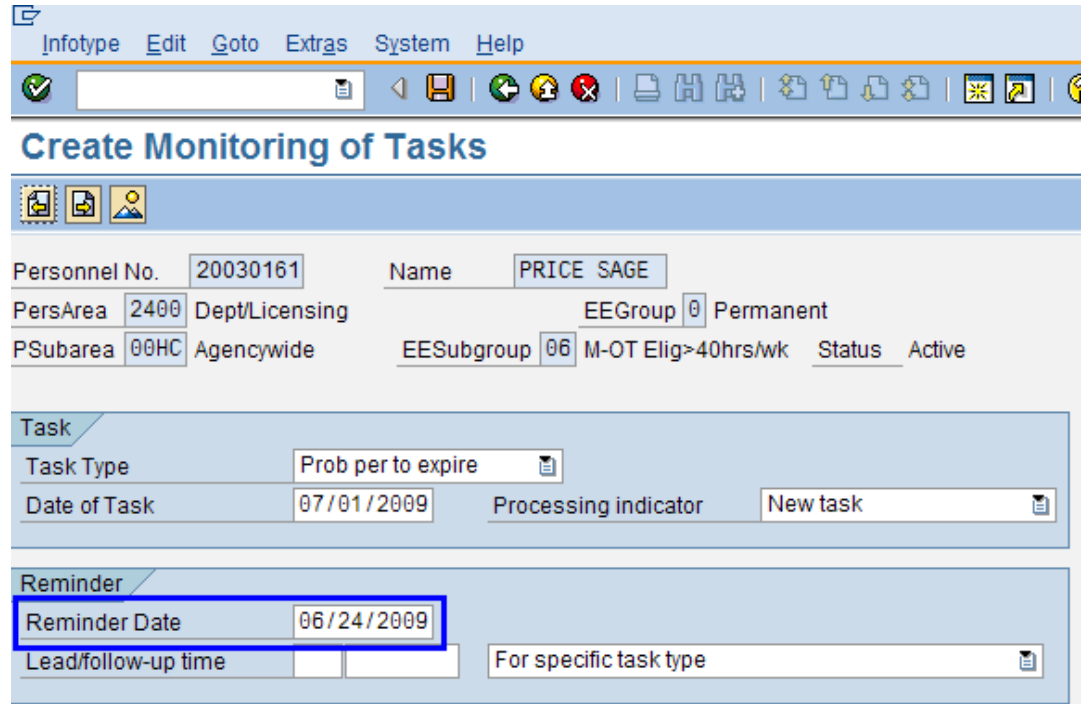
Contract Type: 01 Non-Permanent

Periods

Probationary Period: 6 Months

Monitoring of Tasks (0019)

- The Monitoring of Tasks infotype tracks the dates on which an employee moves from non-permanent status to permanent status.
- Fields to complete:
 - **Reminder Date** or
 - **Lead/follow-up time**
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the 'Create Monitoring of Tasks' form in SAP. The form is divided into several sections. The top section contains fields for Personnel No. (20030161), Name (PRICE SAGE), PersArea (2400), Dept/Licensing, EEGroup (0), Permanent, PSubarea (00HC), Agencywide, EESubgroup (06), M-OT Elig>40hrs/wk, and Status (Active). The 'Task' section has fields for Task Type (Prob per to expire), Date of Task (07/01/2009), and Processing indicator (New task). The 'Reminder' section has fields for Reminder Date (06/24/2009), Lead/follow-up time, and For specific task type. The 'Reminder Date' field is highlighted with a blue border.

Personnel No.	20030161	Name	PRICE SAGE
PersArea	2400	Dept/Licensing	EEGroup 0 Permanent
PSubarea	00HC	Agencywide	EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Task	
Task Type	Prob per to expire
Date of Task	07/01/2009
Processing indicator	New task

Reminder	
Reminder Date	06/24/2009
Lead/follow-up time	
For specific task type	

Addresses (0006)

- The *Addresses* infotype records and stores address data on an employee.

- Fields to complete:

- **Address type**

- *Permanent residence (required)*

- **Street/House no.**

- **Postal code (Zip Code) / City**

- **Office/region (State)**

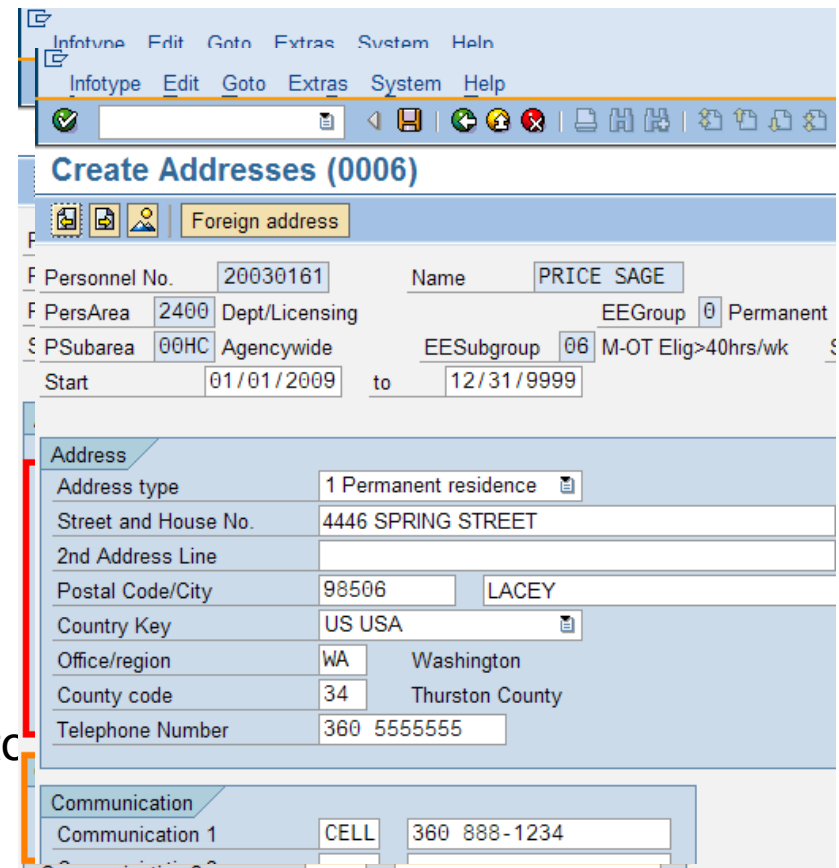
- **County code**

- **Telephone number**

- This information is used to:

- Calculate tax rates
 - The Permanent residence type is used to send benefit information to Department of Retirement Systems and Health Care Authority

- When finished, click  (**Enter**) and then click  (**Save**).



Infotype Edit Goto Extras System Help

Infotype Edit Goto Extras System Help

Create Addresses (0006)

Foreign address

F Personnel No. 20030161 Name PRICE SAGE

F PersArea 2400 Dept/Licensing EEGroup 0 Permanent

S PSubarea 00HC Agencywide EESubgroup 06 M-OT Elig>40hrs/wk

Start 01/01/2009 to 12/31/9999

Address

Address type 1 Permanent residence

Street and House No. 4446 SPRING STREET

2nd Address Line

Postal Code/City 98506 LACEY

Country Key US USA

Office/region WA Washington



County code 34 Thurston County

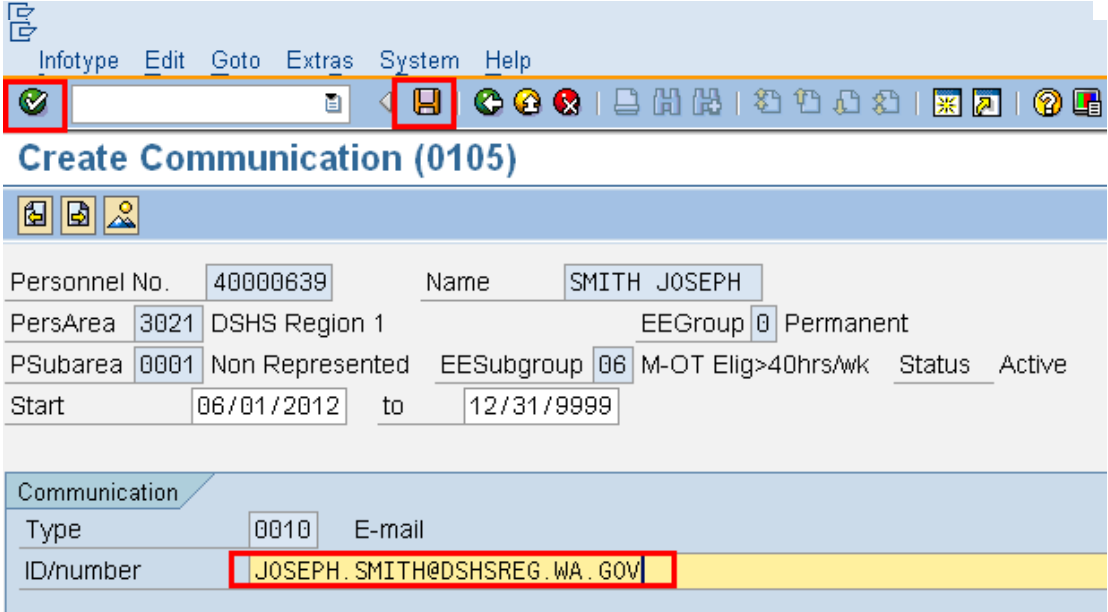
Telephone Number 360 5555555

Communication

Communication 1 CELL 360 888-1234

Communications (0105)

- The communications infotype is used to establish the employee's email address to be used.
- Field to complete:
 - ID/number
- When finished, click **(Enter)**  and then click **(Save)**. 



Infotype Edit Goto Extras System Help

Create Communication (0105)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

Communication

Type 0010 E-mail



ID/number JOSEPH.SMITH@DSHSREG.WA.GOV

Note:

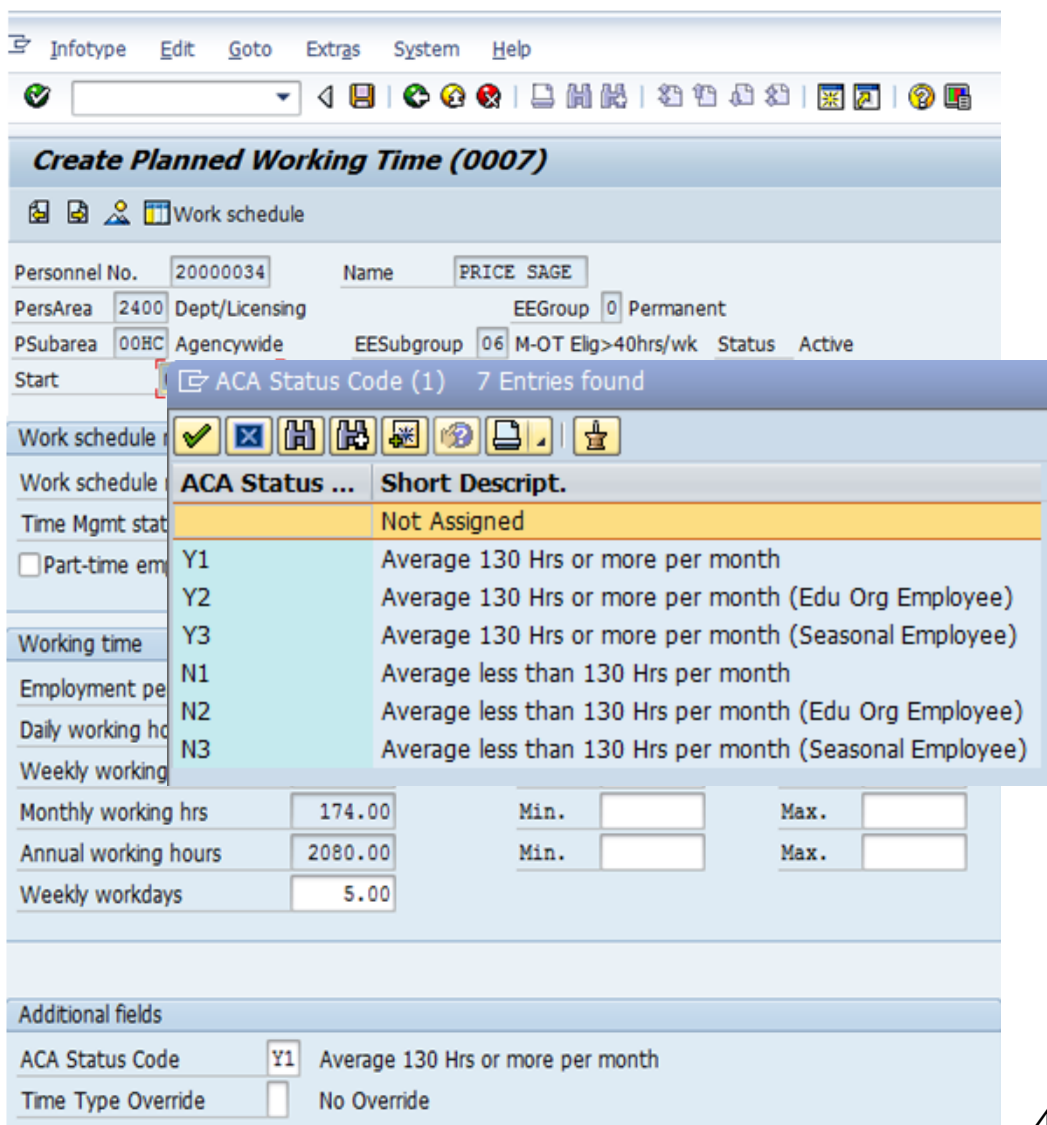
If you do not know the employee's email address at time of hire, click the **next** record button to move to next infotype.

Planned Working Time (0007)

- Fields to complete:
 - Work schedule rule
 - Time Mgmt status
 - Additional time ID
 - Employment percent
 - ACA Status Code
 - Time Type Override*

■ When finished, click  (Enter) and then click  (Save).

* Note:
The Time Type Override box is to only be used by agencies who intend to use TLA



Infotype Edit Goto Extras System Help

Create Planned Working Time (0007)

Work schedule

Personnel No. 20000034 Name PRICE SAGE

PersArea 2400 Dept/Licensing EEGroup 0 Permanent

PSubarea 00HC Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start

ACA Status Code (1) 7 Entries found

ACA Status ...	Short Descript.
Y1	Average 130 Hrs or more per month
Y2	Average 130 Hrs or more per month (Edu Org Employee)
Y3	Average 130 Hrs or more per month (Seasonal Employee)
N1	Average less than 130 Hrs per month
N2	Average less than 130 Hrs per month (Edu Org Employee)
N3	Average less than 130 Hrs per month (Seasonal Employee)

Monthly working hrs 174.00 Min. Max.

Annual working hours 2080.00 Min. Max.

Weekly workdays 5.00


Additional fields

ACA Status Code Y1 Average 130 Hrs or more per month



Time Type Override No Override


Available Work Schedules:

- There are more than 50 work schedules in HRMS.
- Typically, the work schedule is based on a 40-hour week, but HRMS accommodates non-traditional schedules.
 - Rotating work weeks
 - Altered work days (flex schedules)
 - Shortened work weeks
 - 24/7 schedules

Restrict Value Range (1) 53 Entries found				
Restrictions				
				
ES grouping: 2 Holiday Calendar ID: 5C PS grouping: 10				
WS r...	Work schedule rule text	PWS	Start Date	End Date
FULL	5-8s: M-F 8 hpd	P001	01/01/1990	12/31/9999
R003	5-8s: T-St, 8 hpd	P003	01/01/1990	12/31/9999
R005	5-8s: W-Sn, 8 hpd	P005	01/01/1990	12/31/9999
R007	5-8s: Th-M, 8 hpd	P007	01/01/1990	12/31/9999
R009	5-8s: F-T, 8 hpd	P009	01/01/1990	12/31/9999
R011	5-8s: St-W, 8 hpd	P011	01/01/1990	12/31/9999
R013	5-8s: Sn-Th, 8 hpd	P013	01/01/1990	12/31/9999
R015	4-10s: M-Th, 10 hpd	P015	01/01/1990	12/31/9999
R017	4-10s: T-F, 10 hpd	P017	01/01/1990	12/31/9999
R019	4-10s: W-St, 10 hpd	P019	01/01/1990	12/31/9999
R021	4-10s: Th-Sn, 10 hpd	P021	01/01/1990	12/31/9999
R023	4-10s: F-M, 10 hpd	P023	01/01/1990	12/31/9999
R025	4-10s: St-T, 10 hpd	P025	01/01/1990	12/31/9999
R027	4-10s: Sn-W, 10 hpd	P027	01/01/1990	12/31/9999
R030	24/7: M-Sn, 24 hpd	P029	01/01/1990	12/31/9999
R031	4-9s/4: M-Th 9, F 4	P031	01/01/1990	12/31/9999
R032	4-9s/4: M-Th 9, Sn 4	P032	01/01/1990	12/31/9999
R033	4-9s/4: T-F 9, St 4	P033	01/01/1990	12/31/9999
R035	4-9s/4: W-St 9, Sn 4	P035	01/01/1990	12/31/9999
R037	4-9s/4: Th-Sn 9, M 4	P037	01/01/1990	12/31/9999
R039	4-9s/4: F-M 9, T 4	P039	01/01/1990	12/31/9999
R041	4-9s/4: St-T 9, W 4	P041	01/01/1990	12/31/9999
R043	4-9s/4: Sn-W 9, Th 4	P043	01/01/1990	12/31/9999
R045	2Wk: M-Th 9, F 8, 2nd F 0	P045	01/01/1990	12/31/9999
R047	2Wk: M-Th 9, F 0, 2nd F 8	P047	01/01/1990	12/31/9999
R049	2Wk: M-F 9, 2nd Th 8, F 0	P049	01/01/1990	12/31/9999
R051	2Wk: M 8, T-F 9, 2nd M 0	P051	01/01/1990	12/31/9999
R053	2Wk: M 0, T-F 9, 2nd M 8	P053	01/01/1990	12/31/9999
R055	2Wk: M-Th 9, F 8, 2nd M 0, F 9	P055	01/01/1990	12/31/9999

Education (0022)

- The Education subtype indicates the type of education the employee has achieved.
- Fields to complete:
 - **Start**
 - **To**
 - **Education/training**
 - **Institute/location**
 - **Certificate**
- Use the Education infotype to document the details regarding education the employee has received.
- When finished, click  (**Enter**) and then click  (**Save**).

Note: To skip this infotype, click  (**Close**) to move to the next infotype.

Subtypes for infotype "Education" - Restrictions

EE	Educ. est. text
01	High School or GED
02	Voc School w/o HS
03	Voc. or Bus. School
04	Some College-2Qtrs+
05	AA Degree
06	Col Grad 4 Yr Degree
07	Some Grad Work
08	MA/MS/MSW Degree
09	Other Master Degree

Infotype Edit Goto Extras System Help

Create Education (0022)

Personnel No.	20030161	Name	PRICE SAGE
PersArea	2400	Dept/Licensing	EEGroup 0 Permanent
PSubarea	00HC	Agencywide	EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Start	12/01/1996	to	09/01/1998

Educational est.	05	AA Degree
Education/training	5 Business Administration	
Institute/location	Pierce Community College	
Country Key	US USA	
Certificate	16	

Date Specifications (0041) – cont'd

- The Date Specifications infotype documents important employee dates in employment history.
- Dates will default to the effective date of the New Hire.

Infotype Edit Goto Extras System Help

Change Date Specifications (0041)

Personnel No. 20030161 Name PRICE SAGE

PersArea 2400 Dept/Licensing EEGroup 0 Permanent

PSubarea 00HC Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active


Start 01/01/2009 to 12/31/9999 Chng 01/21/2009 JANETP

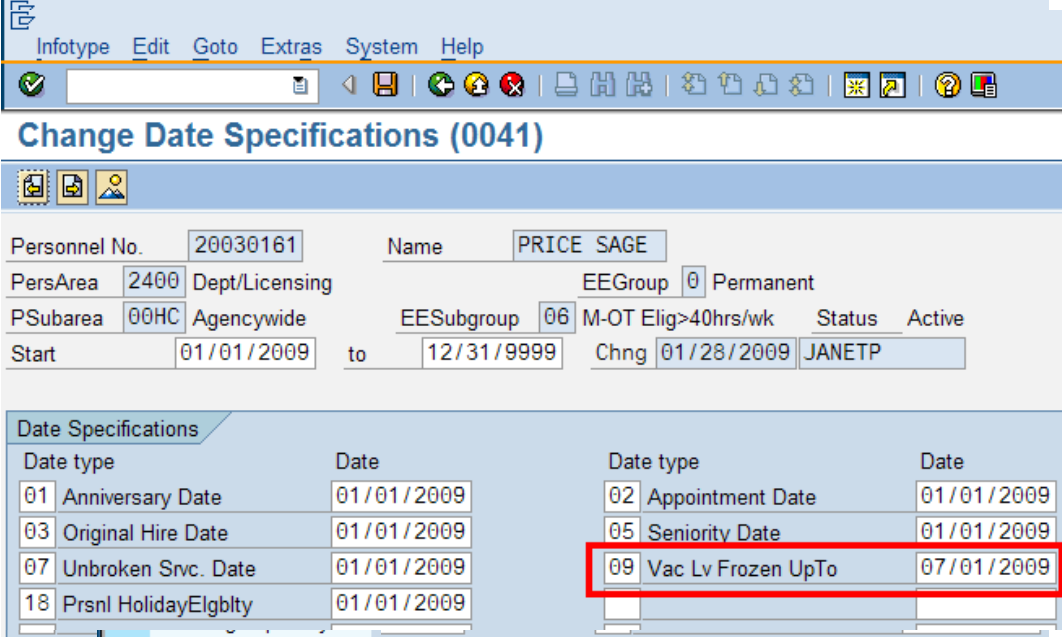
Date Specifications

Date type	Date	Date type	Date
01 Anniversary Date	01/01/2009	02 Appointment Date	01/01/2009
03 Original Hire Date	01/01/2009	05 Seniority Date	01/01/2009
07 Unbroken Svc. Date	01/01/2009	18 Prsnl HolidayElgblty	01/01/2009

Date Specifications (0041)

- HRMS allows up to 12 date types for each record.
- To add another Date type such as 09 *Vac Lv Frozen Up To*

1. Click the  (Matchcode) in the next available Date type field to open selection list.
2. Double-click to select.
3. Enter date eligible.



Date type	Date
01 Anniversary Date	01/01/2009
03 Original Hire Date	01/01/2009
07 Unbroken Svc. Date	01/01/2009
18 Prsnl HolidayElgblty	01/01/2009
02 Appointment Date	01/01/2009
05 Seniority Date	01/01/2009
09 Vac Lv Frozen UpTo	07/01/2009

- When finished, click  (**Enter**) and then click  (**Save**).

Date Specifications – Adjusting Service Dates

- You can adjust the service dates for employees who have worked in other covered jurisdictions (if appropriate), higher education institutions or have served in the military.
 - Although these positions are not former appointments within State of Washington, the work period is recognized by the State for recording purposes.
- Adjusting service dates is important since layoffs are or will be governed by a combination of seniority and performance (as defined by each agency).

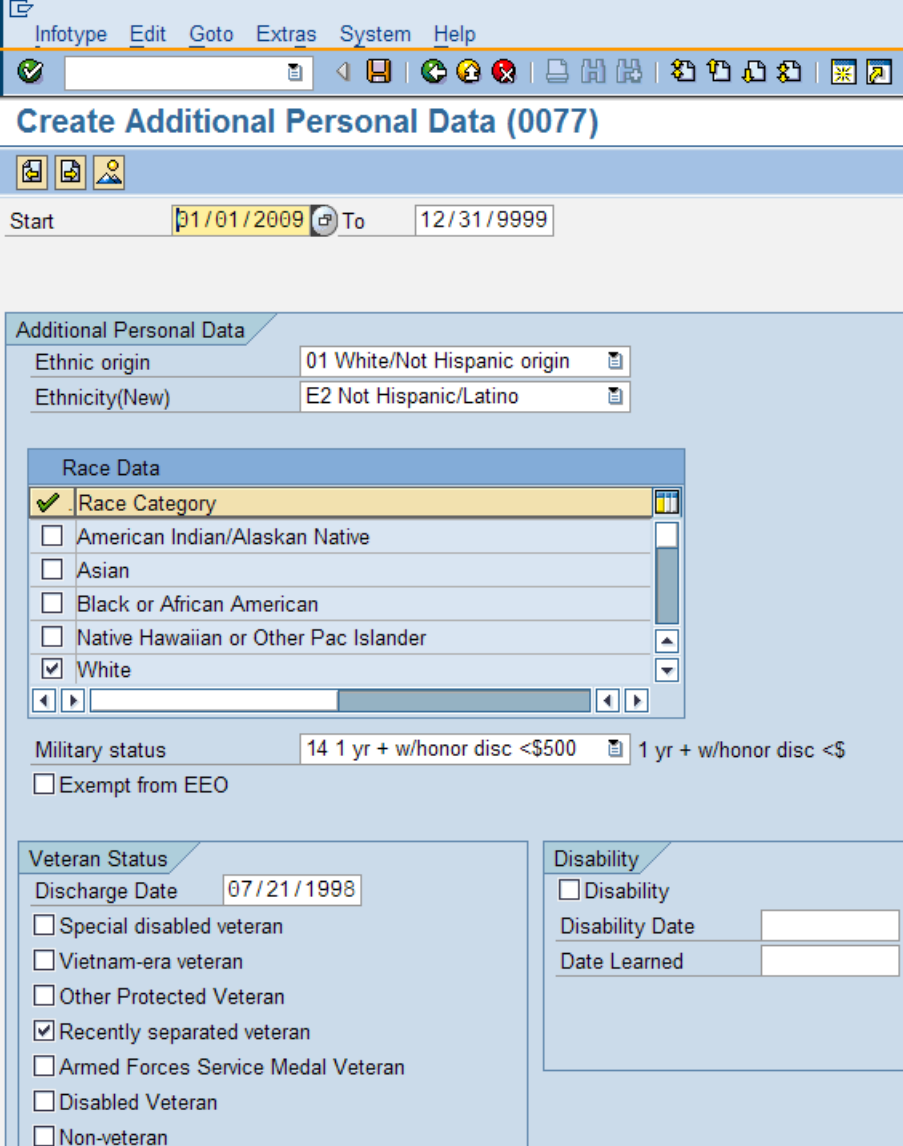
Additional Personal Data (0077)

- The Additional Personal Data infotype documents an employee's Equal Employment Opportunity (EEO) information.

- Fields to complete:

- **Ethnic origin**
- **Ethnicity (New)**
- **Race Category**
- **Military status**
- **Veteran status**
- **Disability**

- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP 'Create Additional Personal Data (0077)' form. The menu bar includes Infotype, Edit, Goto, Extras, System, and Help. The title bar is 'Create Additional Personal Data (0077)'. The form contains several sections:



- Start**: A date range from 01/01/2009 to 12/31/9999.
- Additional Personal Data**:
 - Ethnic origin**: 01 White/Not Hispanic origin
 - Ethnicity(New)**: E2 Not Hispanic/Latino
- Race Data**:
 - Race Category**: A list box with 'White' selected.
 - ☐ American Indian/Alaskan Native
 - ☐ Asian
 - ☐ Black or African American
 - ☐ Native Hawaiian or Other Pac Islander
 - ☒ White
- Military status**: 14 1 yr + w/honor disc <\$500
- ☐ Exempt from EEO
- Veteran Status**:
 - Discharge Date**: 07/21/1998
 - ☐ Special disabled veteran
 - ☐ Vietnam-era veteran
 - ☐ Other Protected Veteran
 - ☒ Recently separated veteran
 - ☐ Armed Forces Service Medal Veteran
 - ☐ Disabled Veteran
 - ☐ Non-veteran
- Disability**:
 - ☐ Disability
 - Disability Date**: [Empty field]
 - Date Learned**: [Empty field]

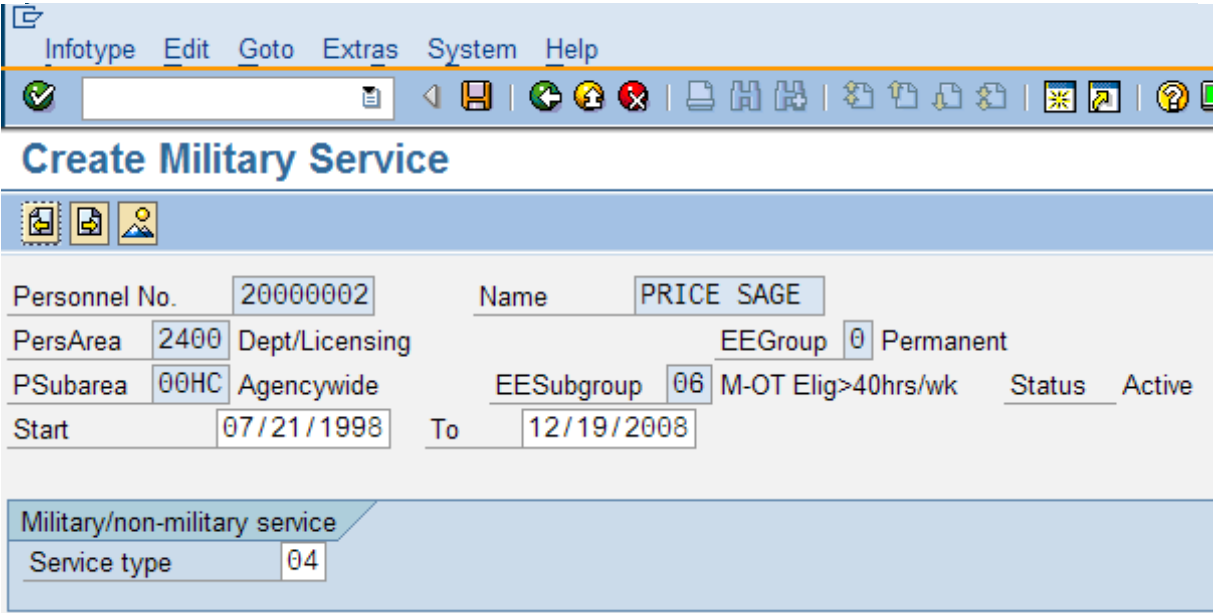
Military Service (0081)

■ The Military Service infotype tracks the branch of military service the employee participated in.

■ Field to complete:

- **Start / To**
- **Service type**
 - 04 - US Air Force

■ When finished, click  **(Enter)** and then click  **(Save).**



The screenshot shows the 'Create Military Service' form in SAP. The form includes fields for Personnel No. (20000002), Name (PRICE SAGE), PersArea (2400), Dept/Licensing, PSubarea (00HC), Agencywide, EESubgroup (06), M-OT Elig>40hrs/wk, Status (Active), Start (07/21/1998), To (12/19/2008), and Service type (04). The 'Military/non-military service' section is highlighted.



ST...	Name
01	United States Marine Corps
02	United States Navy
03	United States Army
04	United States Air Force
05	National Guard
06	Coast Guard

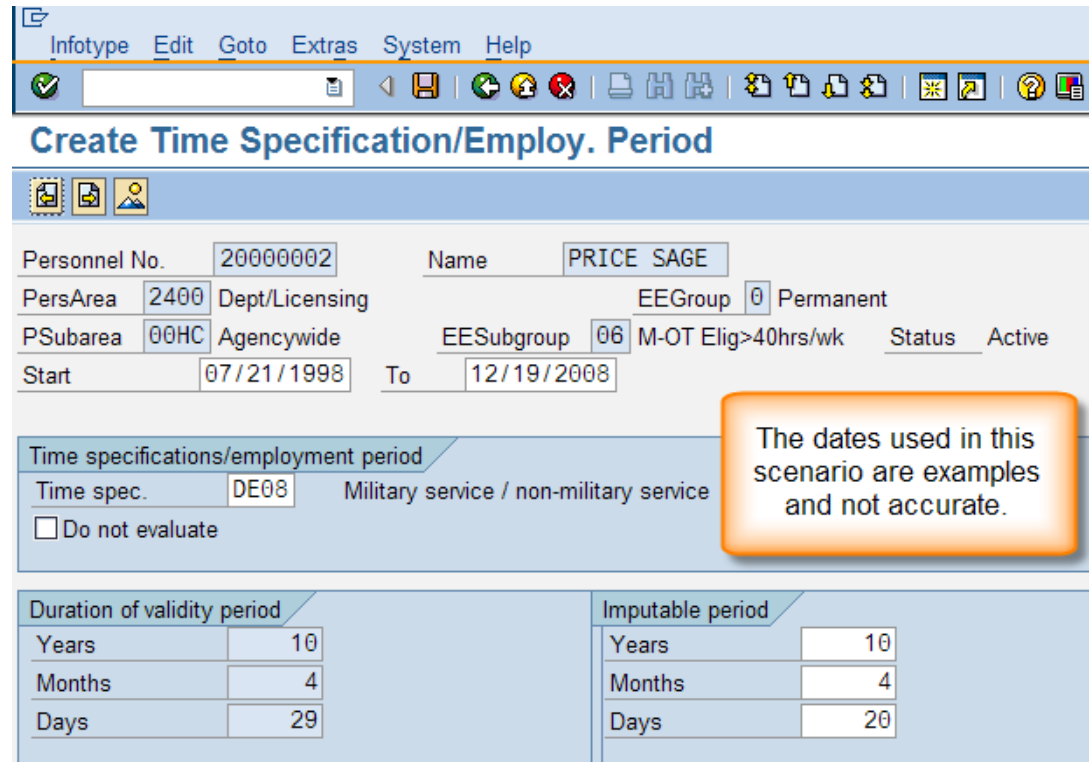
Note: The Start / To dates should reflect the employee's military service dates listed on the form DD 214.

Time Specifications / Employment Period **(0552)**

- The Time Specifications / Employment Period infotype tracks any military service dates and the resulting time spent in the service.

- Fields to complete:
 - **Start** (01/21/1999)
 - **To** (02/01/2002)
 - **Imputable period** (Years, Months, and Days)

- When finished, click  **(Enter)** and then click  **(Save)**.



Create Time Specification/Employ. Period

Personnel No. 20000002 Name PRICE SAGE

PersArea 2400 Dept/Licensing EESubgroup 06 M-OT Elig>40hrs/wk Status Active

PSubarea 00HC Agencywide

Start 07/21/1998 To 12/19/2008

Time specifications/employment period

Time spec. DE08 Military service / non-military service



☐ Do not evaluate

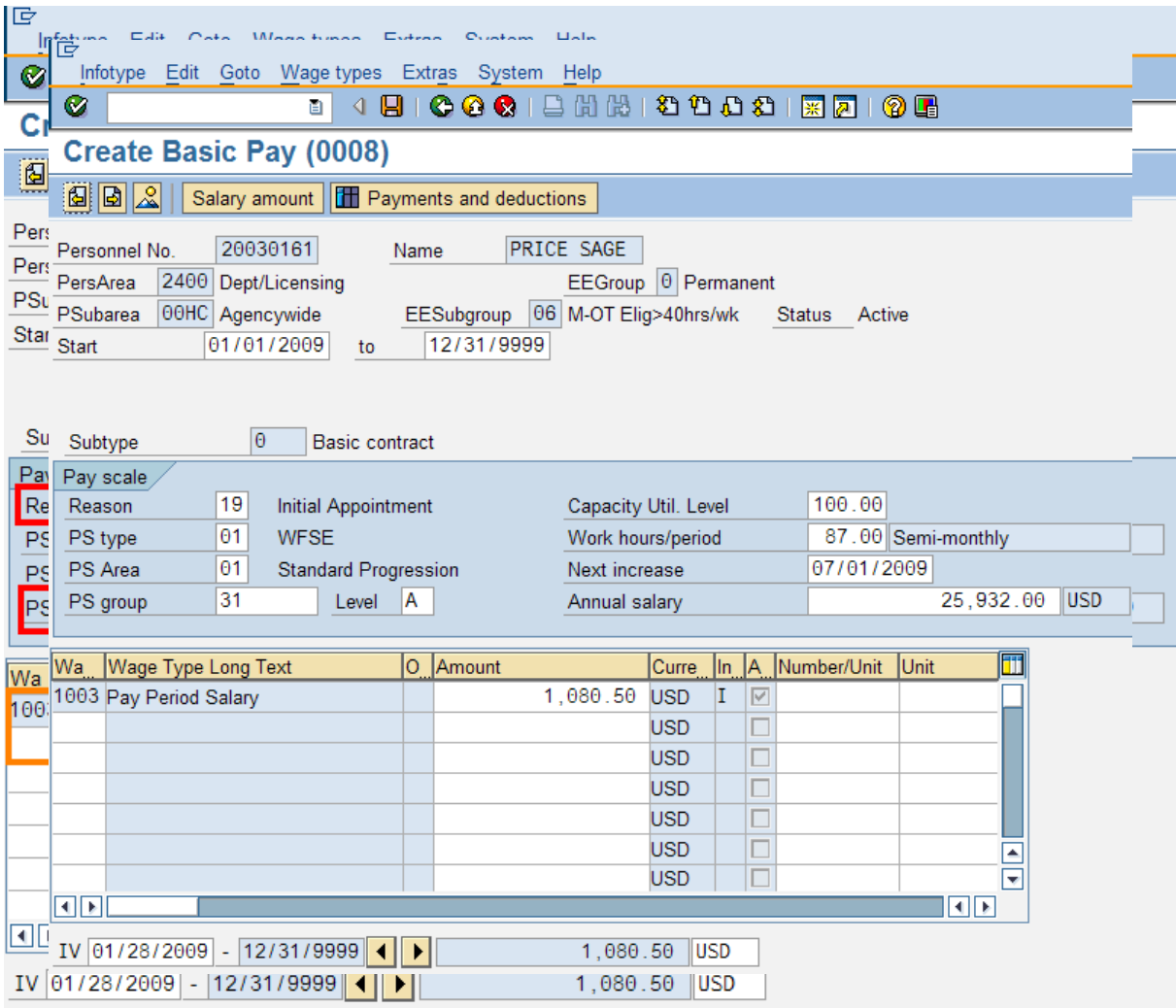
The dates used in this scenario are examples and not accurate.

Duration of validity period		Imputable period	
Years	10	Years	10
Months	4	Months	4
Days	29	Days	20

Note: The Start / To dates should reflect the employee's military service dates listed on the form DD 214.

Basic Pay (IT00008)

- The Basic Pay infotype records pay scale and salary information for an employee.
- Fields to complete:
 - Reason – (19 Initial Appointment)
 - Next Increase – (optional)
 - PS Level
 - Capacity utility level (defaults in)
- When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Wage types Extras System Help

Infotype Edit Goto Wage types Extras System Help

Create Basic Pay (0008)

Salary amount Payments and deductions

Pers: Personnel No. 20030161 Name PRICE SAGE

Pers: PersArea 2400 Dept/Licensing EEGGroup 0 Permanent

PS: PSubarea 00HC Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Star Start 01/01/2009 to 12/31/9999

Su Subtype 0 Basic contract

Pay Pay scale

Re Reason 19 Initial Appointment Capacity Util. Level 100.00

PS PS type 01 WFSE Work hours/period 87.00 Semi-monthly

PS PS Area 01 Standard Progression Next increase 07/01/2009

PS PS group 31 Level A Annual salary 25,932.00 USD

Wa	Wage Type Long Text	O	Amount	Curre	In	A	Number/Unit	Unit
1003	Pay Period Salary		1,080.50	USD	I	✓		
				USD		✓		
				USD		✓		
				USD		✓		
				USD		✓		
				USD		✓		
				USD		✓		

IV 01/28/2009 - 12/31/9999 1,080.50 USD

IV 01/28/2009 - 12/31/9999 1,080.50 USD

Note:

New hires that start at the first step of their range receive their first PID at six months.

Agency HR processors must input the employee's first six month PID in the Next Increase field on the Basic Pay

Personnel Administration / Payroll Handoff

- At this point in the Hire action, the employee is created in HRMS and the system generates a Personnel Number, but the employee cannot be paid yet.
- You are responsible for following your agency procedures on completing the New Hire action beyond this point.
- The Payroll Processor or Benefits Processor is responsible for completing the following infotypes:
 - *Bank Details*
 - *Recurring Payments / Deductions*
 - *Create Unemployment State*
 - *Withholdings Info W4 / W5 US*
 - *Additional Withholding*
 - *Benefits Enrollment*



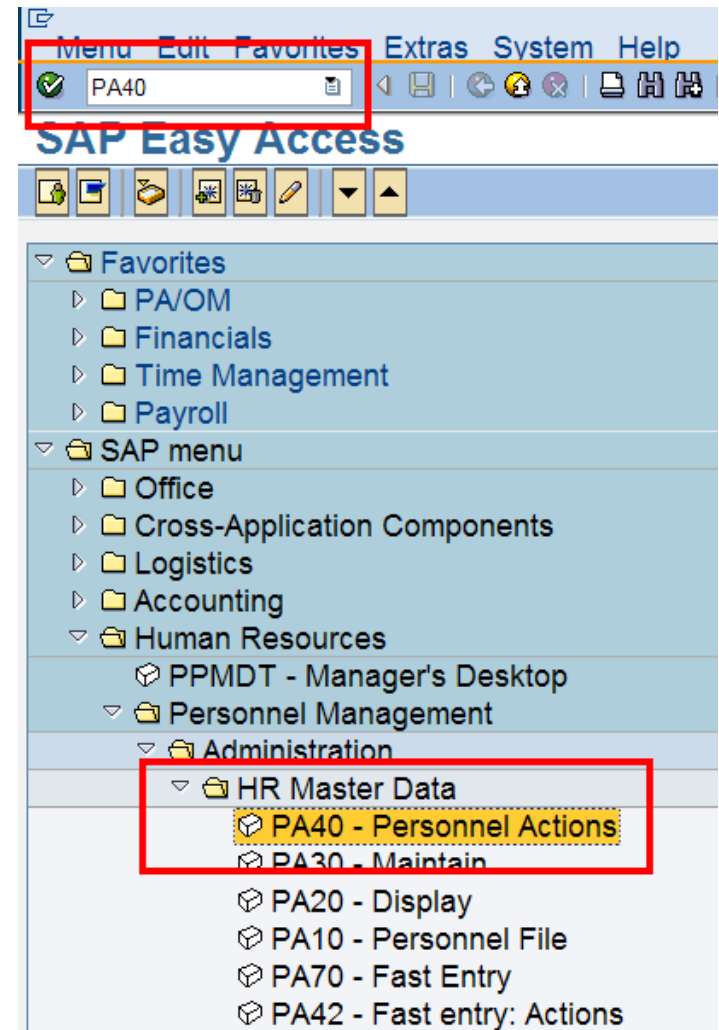
After saving *Basic Pay* (0008), HRMS will automatically return you to the ***Personnel Actions*** screen.

Restarting an Action


- During the New Hire, the Personnel Administration (PA) Processor may find themselves needing to stop in the middle of the Personnel Action transaction (PA40). In this case, the last infotype that was saved is where the PA Processor will continue.
 - This can be done when completing any of the Personnel Action such as the Rehire, Appointment, Separation, etc.
 - By restarting an action, it ensures that all infotypes are completed.

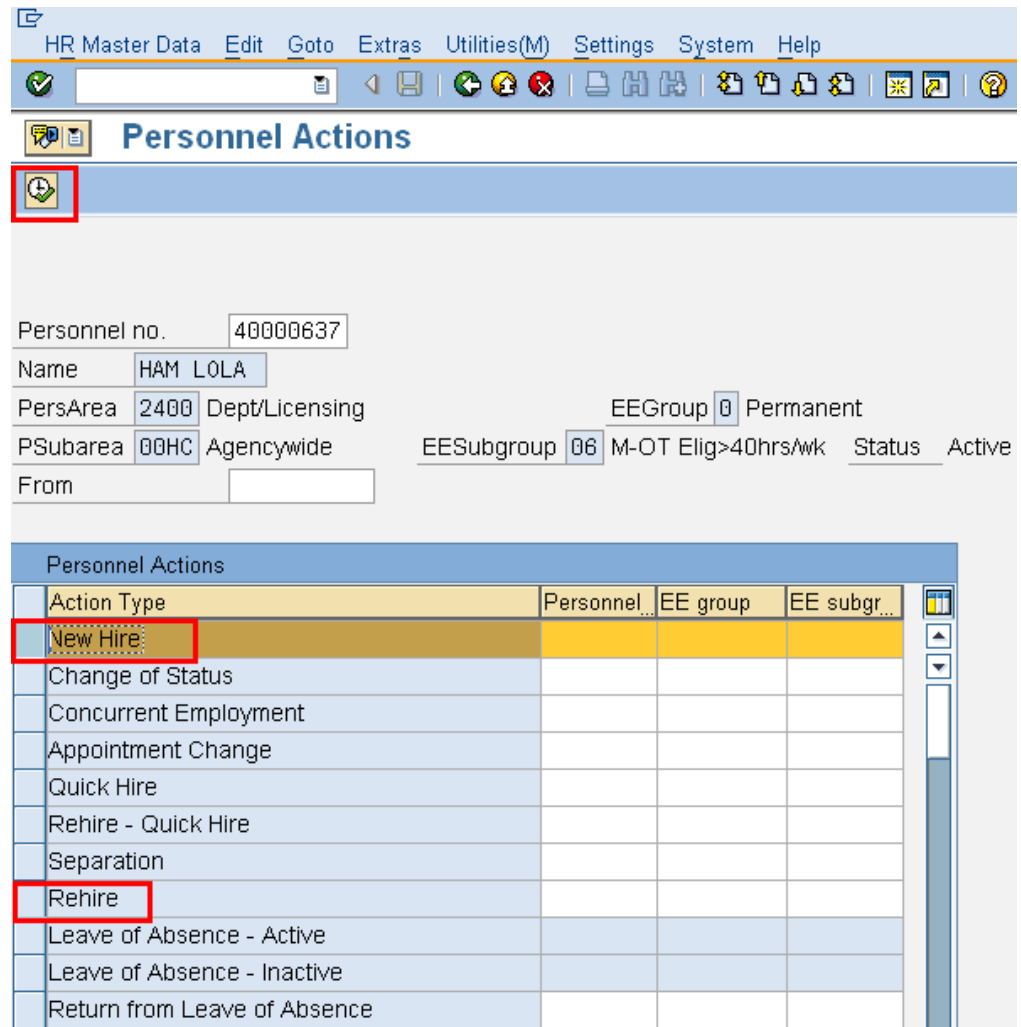
Restarting a Personnel Action

- To restart a Personnel action use the menu path:
 - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
 - Or enter transaction code **PA40** in the **Command** field



Accessing the New Hire/Rehire Action

- A personnel number is required to complete the New Hire or Rehire action.
- To access the action, click the box to the left of *New Hire or Rehire*.
- Click  (**Execute**) to execute the action.



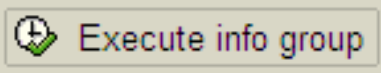
HR Master Data Edit Goto Extras Utilities(M) Settings System Help

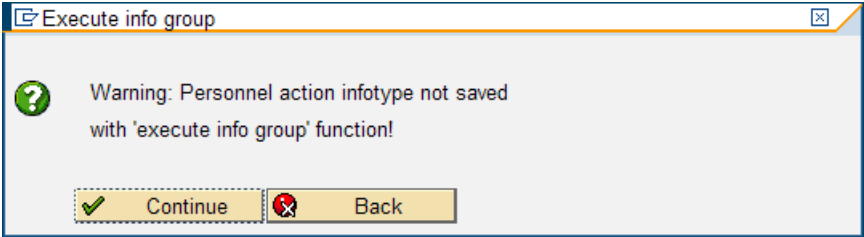
Personnel Actions

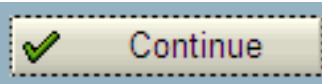
Personnel no. 40000637
Name HAM LOLA
PersArea 2400 Dept/Licensing Agencywide
EEGroup 0 Permanent
PSubarea 00HC M-OT Elig>40hrs/wk Status Active
From

Action Type	Personnel	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

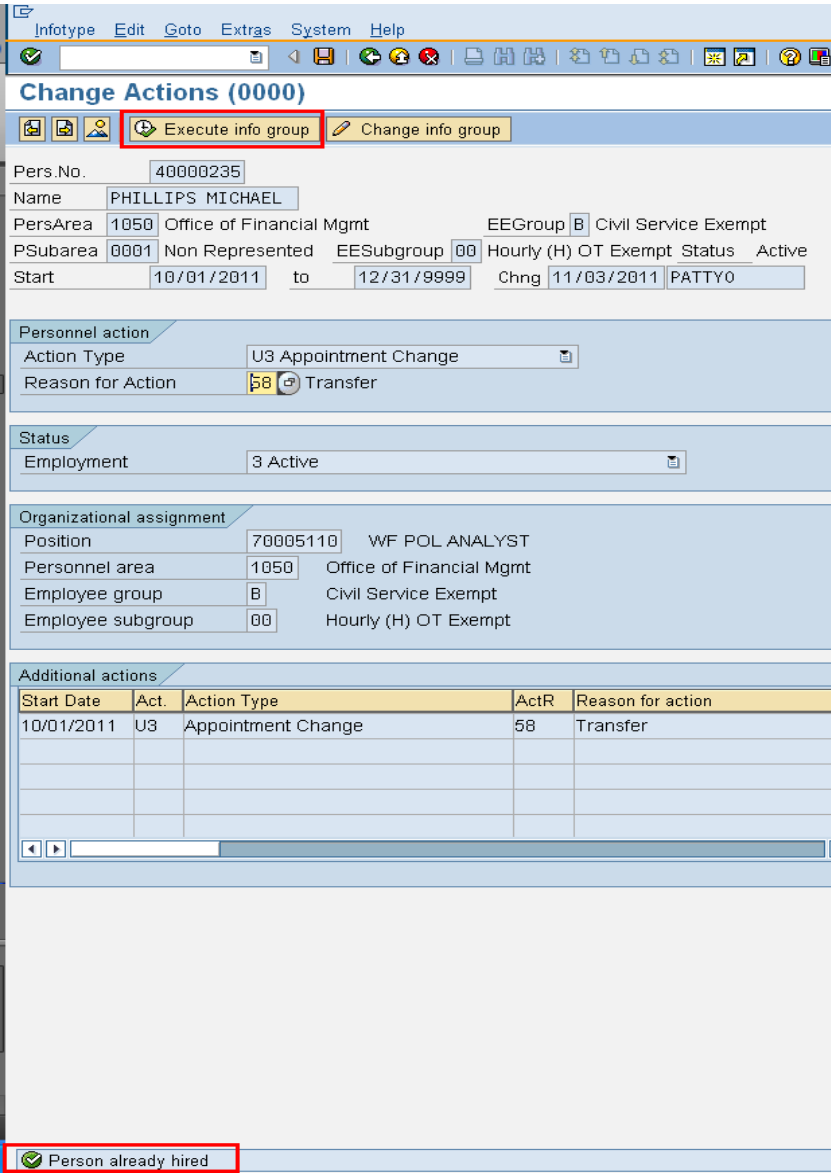
New Hire/Rehire action

- From *Actions* (0000) click  (Execute info group)
- The following warning message will appear:



- Click  (Continue)

Note: Notice message on the status bar of 'Person already hired'.



Change Actions (0000)

Execute info group Change info group

Pers.No. 40000235
Name PHILLIPS MICHAEL
PersArea 1050 Office of Financial Mgmt EESubgroup 00 Hourly (H) OT Exempt Status Active
PSubarea 0001 Non Represented EESubgroup 00 Hourly (H) OT Exempt Status Active
Start 10/01/2011 to 12/31/9999 Chng 11/03/2011 PATTY0

Personnel action
Action Type U3 Appointment Change
Reason for Action 58 Transfer

Status
Employment 3 Active


Organizational assignment
Position 70005110 WF POL ANALYST
Personnel area 1050 Office of Financial Mgmt
Employee group B Civil Service Exempt
Employee subgroup 00 Hourly (H) OT Exempt

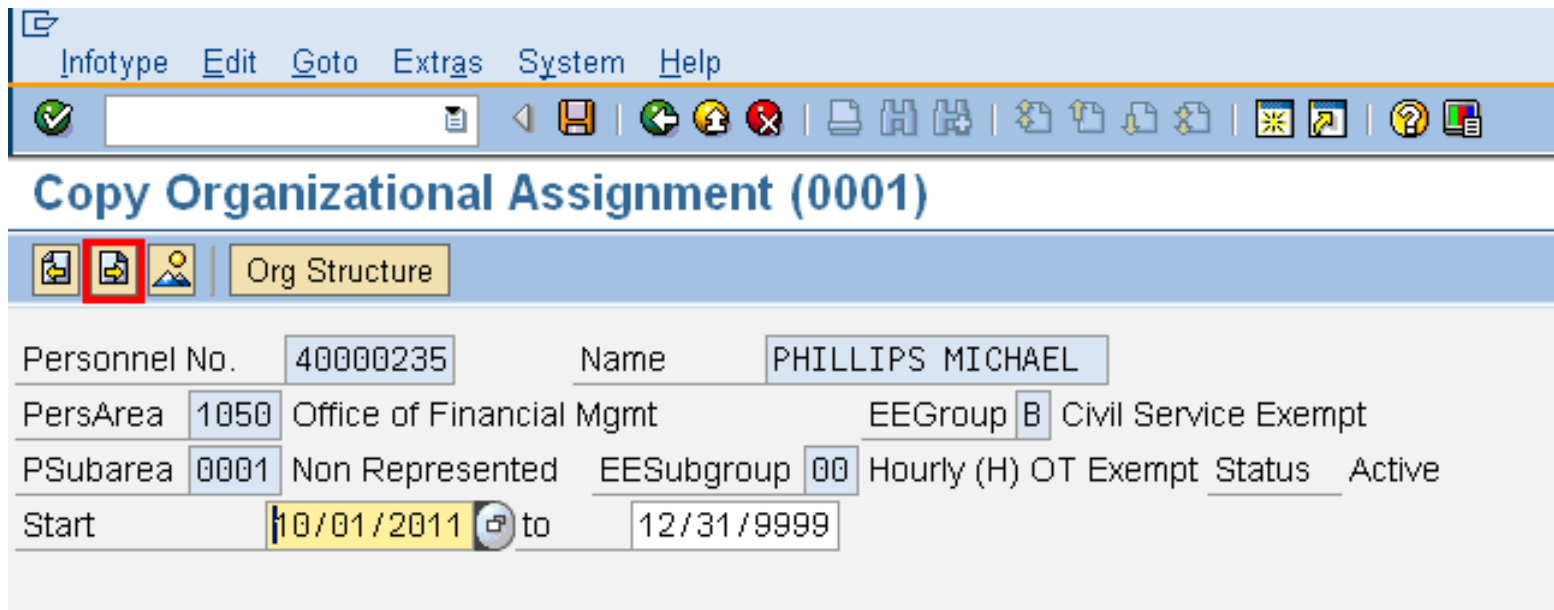
Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
10/01/2011	U3	Appointment Change	58	Transfer

Person already hired

New Hire/Rehire action

- As mentioned before, because the action has already been started you will begin from the last infotype saved.
- Once the Infotype Group is executed, you will have to click  **(Next Record)** until you reach the appropriate infotype.



The screenshot shows the SAP 'Copy Organizational Assignment (0001)' screen. The title bar includes a menu (Infotype, Edit, Goto, Extras, System, Help) and a toolbar with various icons. Below the title bar, there are three icons (a document with an arrow, a document with a magnifying glass, and a person icon) and a button labeled 'Org Structure'. The main area contains several input fields for personnel data:

Personnel No.	40000235	Name	PHILLIPS MICHAEL
PersArea	1050	Office of Financial Mgmt	EEGroup B Civil Service Exempt
PSubarea	0001	Non Represented	EESubgroup 00 Hourly (H) OT Exempt Status Active
Start	10/01/2011	to	12/31/9999




HRMS Activity

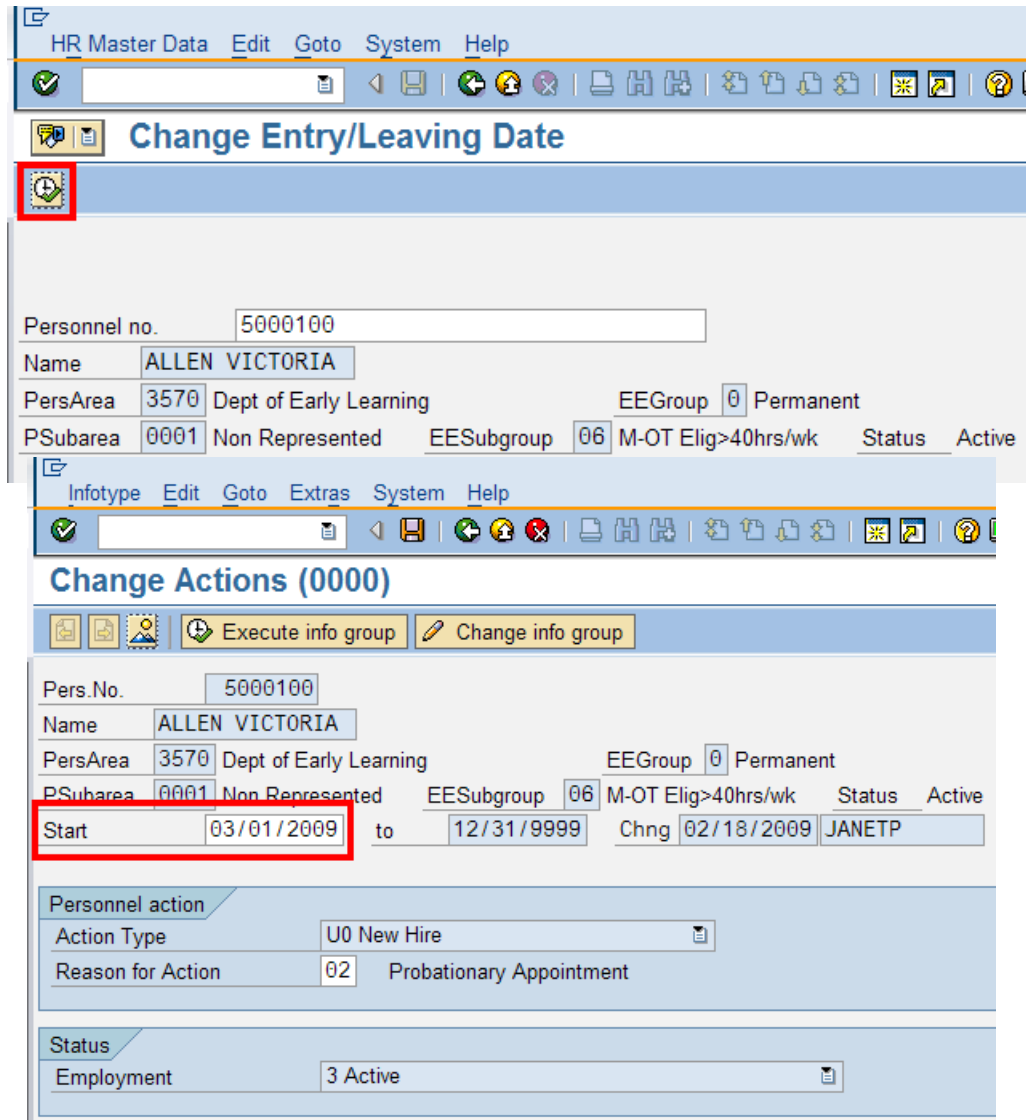


Hire an Employee

**Change Entry
Date**

Change Entry Date– New Hire

- To change the employee's start date after the hire action has been completed **AND** payroll has not been processed, use the Change Entry/Leaving Date transaction **PA41**.
- From the Change Entry/Leaving Date screen, click  (**Execute**).
- Enter new date in **Start** field, click  (**Enter**) and then click  (**Save**).



HR Master Data Edit Goto System Help

Change Entry/Leaving Date

Personnel no. 5000100

Name ALLEN VICTORIA

PersArea 3570 Dept of Early Learning EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Infotype Edit Goto Extras System Help

Change Actions (0000)

Execute info group Change info group

Pers.No. 5000100

Name ALLEN VICTORIA

PersArea 3570 Dept of Early Learning EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 03/01/2009 to 12/31/9999 Chng 02/18/2009 JANETP

Personnel action




Action Type U0 New Hire

Reason for Action 02 Probationary Appointment

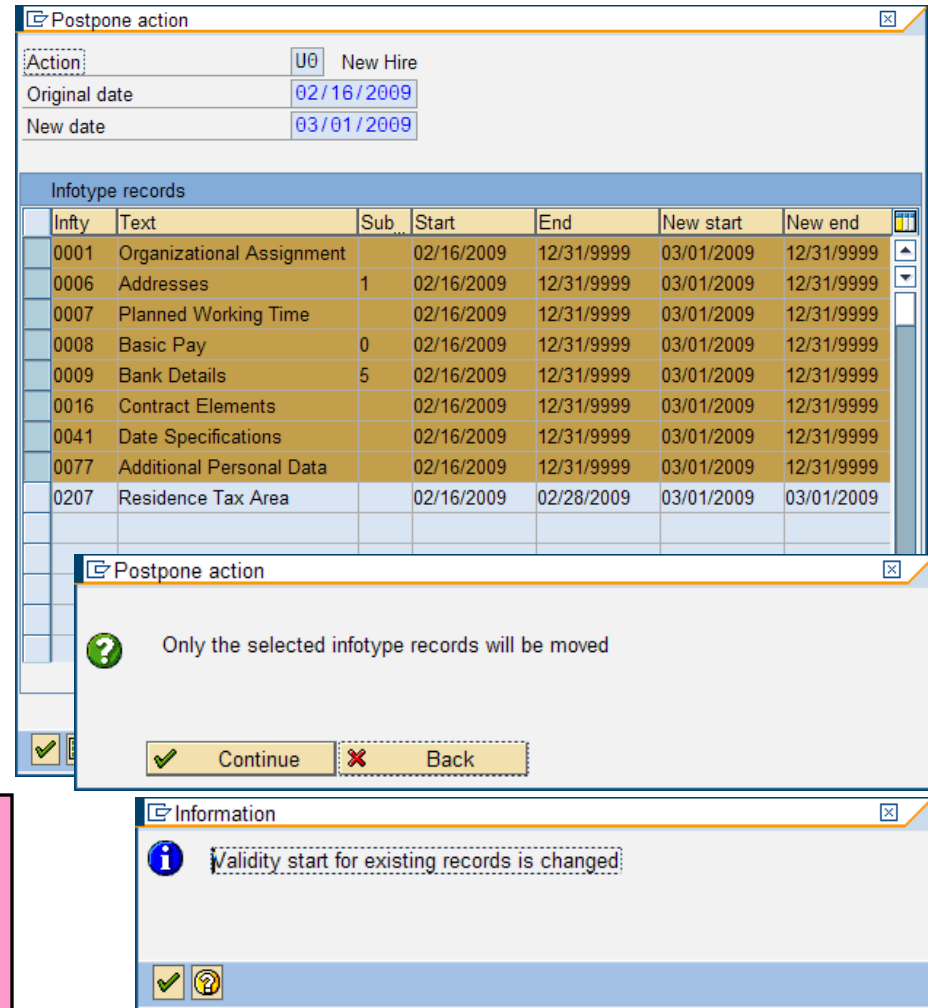
Status

Employment 3 Active

Change Entry Date – New Hire

- Select all infotypes that will need to be changed.
- Click  **(Continue (Enter))**.
- Postpone action dialog will appear, click  **(Continue)**.
- Information dialog will appear, click  **(Continue)**.

See OLQR User Procedure, [New Hire Action – Change Entry Date](#) for more information.



The image displays three overlapping SAP dialog boxes. The top dialog, titled 'Postpone action', shows the 'Action' as 'U0 New Hire', the 'Original date' as '02/16/2009', and the 'New date' as '03/01/2009'. Below this is a table of 'Infotype records' with columns for Infity, Text, Sub, Start, End, New start, and New end. The table lists various infotypes such as Organizational Assignment, Addresses, Planned Working Time, Basic Pay, Bank Details, Contract Elements, Date Specifications, Additional Personal Data, and Residence Tax Area, all with their respective start and end dates updated to 03/01/2009. The middle dialog, also titled 'Postpone action', features a question mark icon and the message 'Only the selected infotype records will be moved', with 'Continue' and 'Back' buttons. The bottom dialog, titled 'Information', shows an information icon and the message 'Validity start for existing records is changed', with 'Continue' and 'Help' buttons.

Infity	Text	Sub	Start	End	New start	New end
0001	Organizational Assignment		02/16/2009	12/31/9999	03/01/2009	12/31/9999
0006	Addresses	1	02/16/2009	12/31/9999	03/01/2009	12/31/9999
0007	Planned Working Time		02/16/2009	12/31/9999	03/01/2009	12/31/9999
0008	Basic Pay	0	02/16/2009	12/31/9999	03/01/2009	12/31/9999
0009	Bank Details	5	02/16/2009	12/31/9999	03/01/2009	12/31/9999
0016	Contract Elements		02/16/2009	12/31/9999	03/01/2009	12/31/9999
0041	Date Specifications		02/16/2009	12/31/9999	03/01/2009	12/31/9999
0077	Additional Personal Data		02/16/2009	12/31/9999	03/01/2009	12/31/9999
0207	Residence Tax Area		02/16/2009	02/28/2009	03/01/2009	03/01/2009

Rehire

Rehire Overview

Upon completion of this section, you will be able to:

- Describe the difference between a Hire action and a Rehire action.
- Navigate through the Employee Rehire infotypes and understand the importance of the information in each infotype.
- Complete a Rehire action in HRMS.

Rehire an Employee

- Use the Rehire action for previous state employee and their Personnel Number exists in HRMS.
 - You have the ability to search for the employee in HRMS from the Personnel Actions screen (**PA40**).
- During the Rehire action, infotypes that were created from the previous appointment will have fields that are already completed. You will need to review and update these fields if necessary.
 - Example: The *Addresses* infotype (0006) will have the address from the employee's last appointment.

Rehire Infotypes

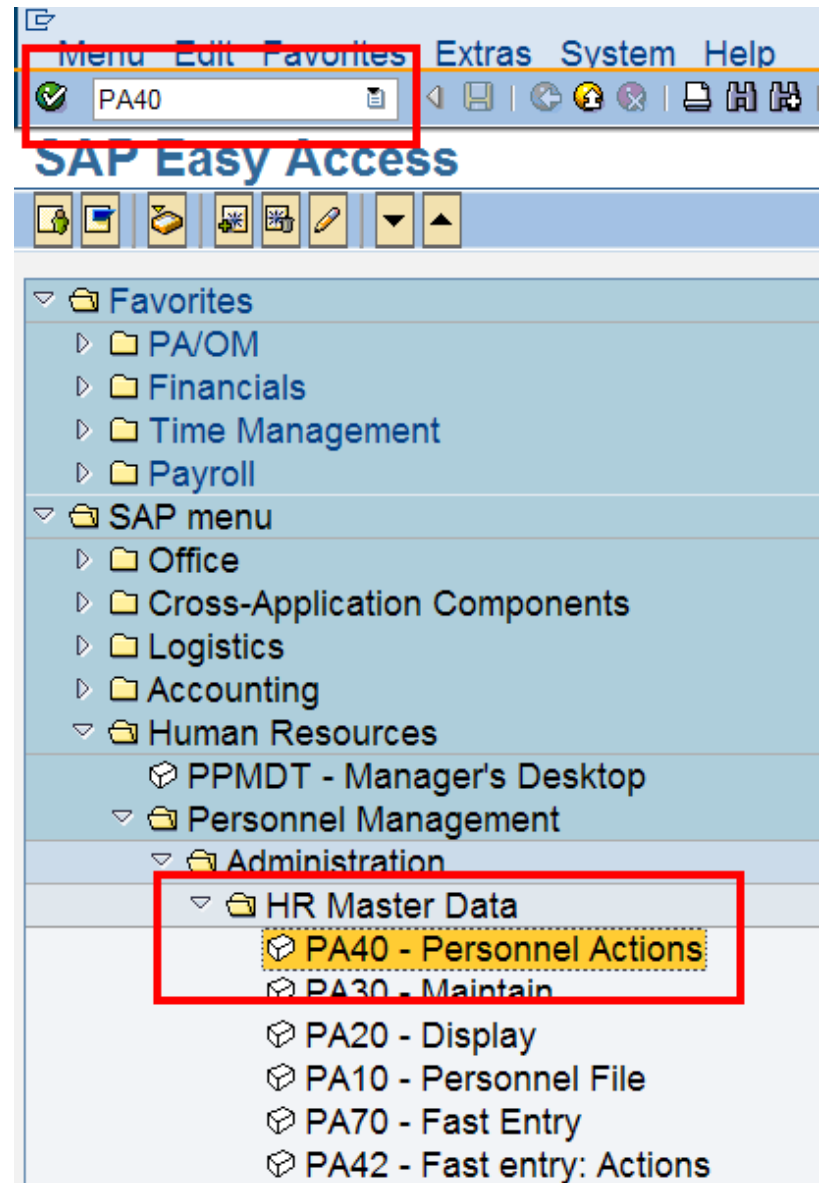
- Update the following infotypes during the Rehire action including:
 - Actions (0000)
 - Personal Data (0002)
 - Organizational Assignment (0001)
 - Contract Elements (0016)
 - Monitoring of Tasks (0019)
 - Addresses (0006)
 - Planned Working Time (0007)
 - Education (0022)
 - Date Specifications (0041)
 - Additional Personal Data (0077)
 - Basic Pay (0008)

Rehire from different Agency


- When rehiring an employee who was not previously employed at the your agency, you will need to perform the following to update the employee's organizational record to reflect your agency:
 - PA40/ PRNR/ REHIRE
 - Update the **Actions(0000)** and **Save**
 - Green check the delimit message to continue
 - Update the **Personnel Data (0002)** and **Save**
 - If no updates click **next record**
 - Update the **Organizational Assignment (0001)** and **Save**
 - Make selection of **Delimit Vacancy**
 - Close the sub-type for the Education Infotype
- Once you closed the Education Infotype, HRMS will kick you out of the **Rehire** Action
- You must **restart** the **Rehire Action** to complete the rehire.

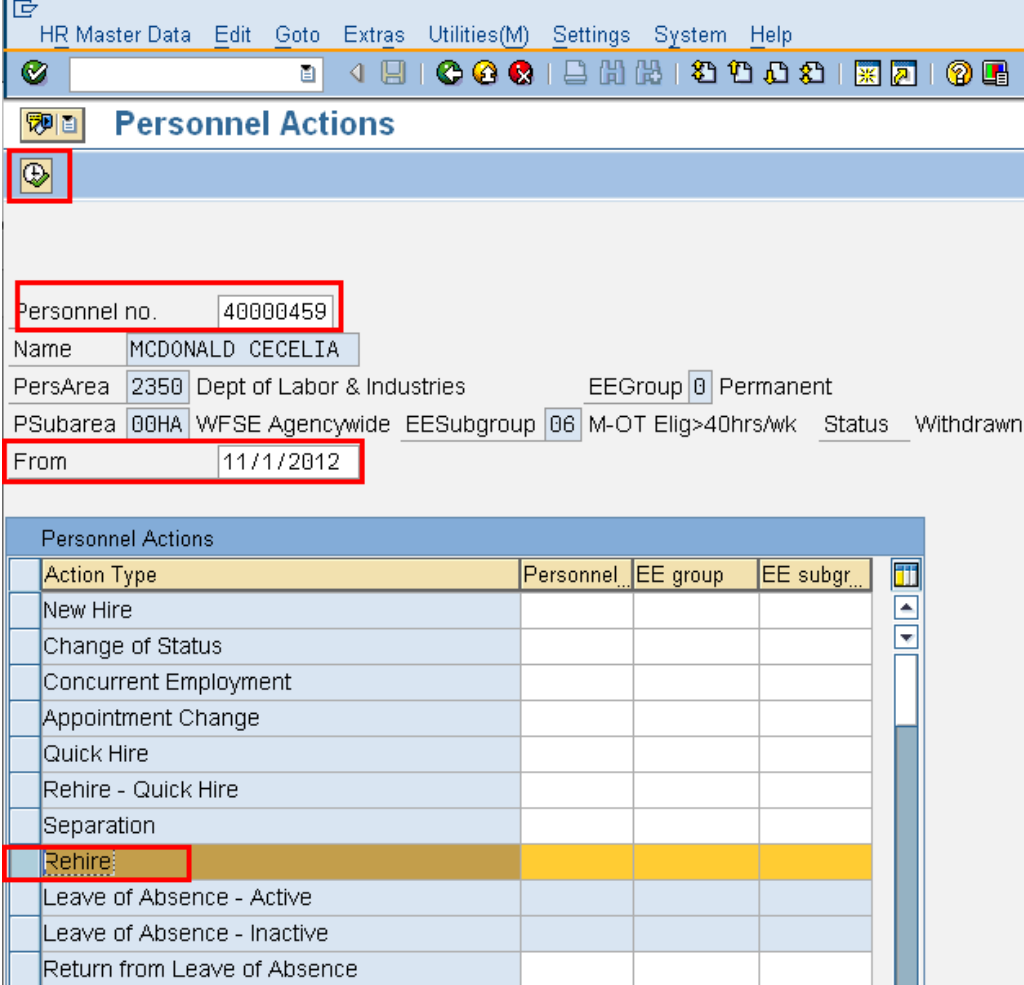
Rehire Action

- To create a Rehire Action using the menu path:
 - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
 - Or enter transaction code **PA40** in the **Command** field



Rehire Personnel Action

- A Personnel Number is required to rehire an employee.
- Fields to complete:
 - **From** (*Date of Hire*)
 - **Personnel no.**
- To access the Rehire action, click the box to the left of *Rehire*.
- Then click  (**Execute**).



HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Personnel no. 40000459

Name MCDONALD CECELIA

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Withdrawn

From 11/1/2012

Action Type	Personnel	EE group	EE subgr
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

Actions (0000)

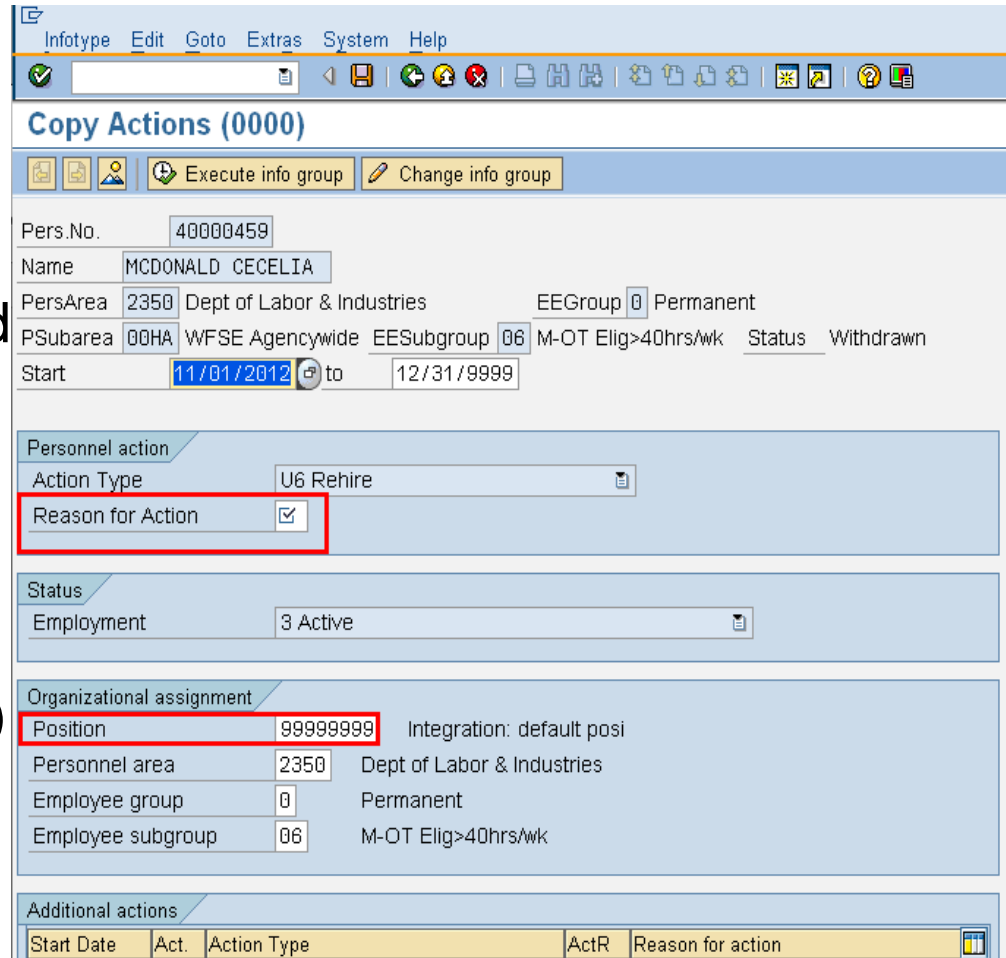
■ Fields to complete:

- Reason for Action (use matchcode)
- Position

■ Click (Enter) to validate and populate the following fields:

- Personnel Area
- Employee Group
- Employee Sub-group

■ When finished, click (Enter) and then click (Save).



Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000459
Name MCDONALD CECELIA
PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
PSubarea 00HA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Withdrawn
Start 11/01/2012 to 12/31/9999

Personnel action
Action Type U6 Rehire
Reason for Action ☒

Status
Employment 3 Active

Organizational assignment
Position 99999999 Integration: default posi
Personnel area 2350 Dept of Labor & Industries
Employee group 0 Permanent
Employee subgroup 06 M-OT Elig>40hrs/wk


Additional actions


Start Date	Act.	Action Type	ActR	Reason for action
------------	------	-------------	------	-------------------

Delimit Message




- The delimit message will appear when validating the information entered on the infotype. The message reads “**Record valid from XX/XX/XXXX to XX/XX/XXXX delimited at end**”.

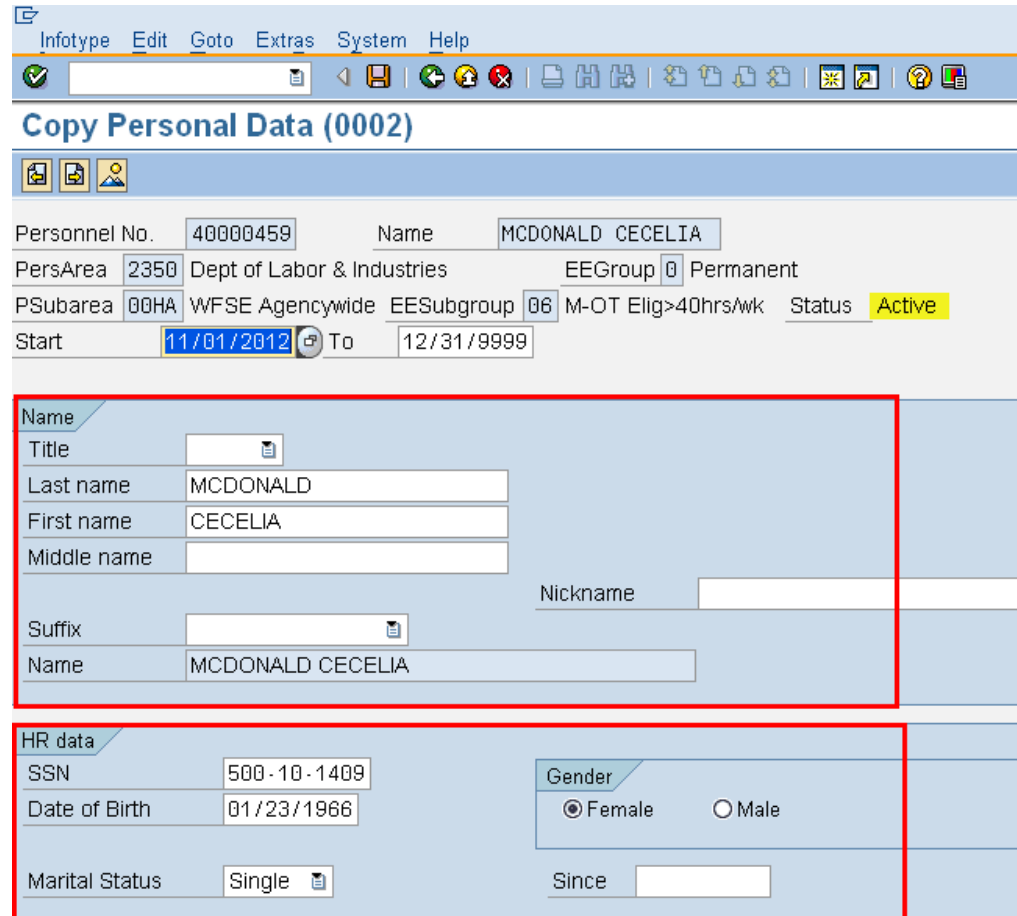
 Record valid from 06/01/2008 to 12/31/9999 delimited at end

- Continue to  **(Enter)** through message until the “Save Your Entries” prompt appears.

 Save your entries

Personal Data (0002)

- For a rehire, verify and correct any data on this infotype.
- When finished, click  (Enter) and then click  (Save). If information is correct, **do not save** and click  (Next Record).



Infotype Edit Goto Extras System Help

Copy Personal Data (0002)

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 2350 Dept of Labor & Industries EESubgroup 06 M-OT Elig>40hrs/Awk Status Active

Start 11/01/2012 To 12/31/9999

Name

Title

Last name MCDONALD

First name CECELIA

Middle name

Nickname

Suffix

Name MCDONALD CECELIA

HR data

SSN 500-10-1409

Date of Birth 01/23/1966

Gender ☒ Female ☐ Male

Marital Status Single

Since

Organizational Assignment (0001)

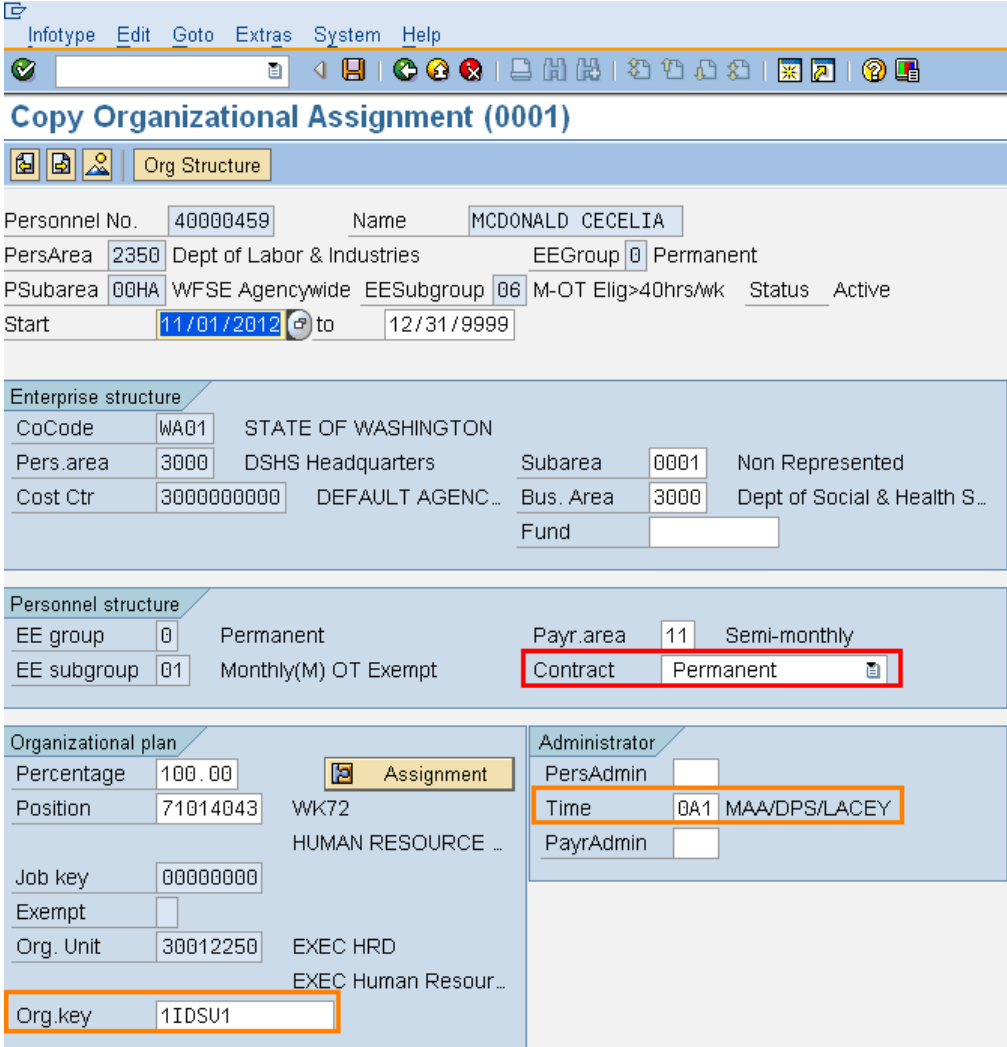
■ Fields to complete:

- **Contract**
 - 02 Probation

■ Optional fields:

- Org Key
- Administrator (Time)

- ## ■ When finished, click (Enter) and then click (Save).



Infotype Edit Goto Extras System Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 11/01/2012 to 12/31/9999

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 3000 DSHS Headquarters Subarea 0001 Non Represented

Cost Ctr 3000000000 DEFAULT AGENC... Bus. Area 3000 Dept of Social & Health S...

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 01 Monthly(M) OT Exempt **Contract Permanent**

Organizational plan

Percentage 100.00 Assignment

Position 71014043 WK72

HUMAN RESOURCE ...

Job key 00000000

Exempt

Org. Unit 30012250 EXEC HRD

EXEC Human Resour...

Org.key 1IDSU1

Administrator

PersAdmin

Time 0A1 MAA/DPS/LACEY

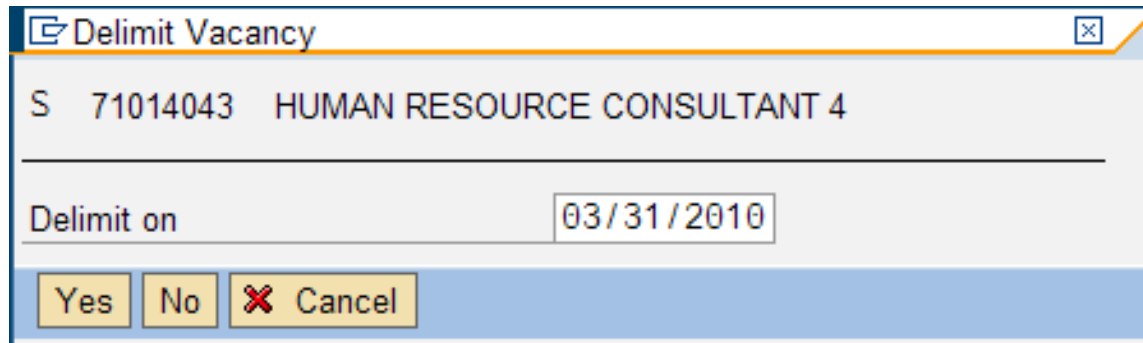
PayrAdmin

Delimit Vacancy

A feature used to report vacant positions. Information will be updated on the *Position Vacancy* infotype located in Organizational Management.

- This popup window will appear if the position is vacant or if multi-filled.
- Click 'Yes' to delimit the vacancy.
- Click 'No' to not delimit the vacancy.

Note: If the position is multi-filled select 'No'.



The screenshot shows a dialog box titled "Delimit Vacancy". Inside the dialog, the text "S 71014043 HUMAN RESOURCE CONSULTANT 4" is displayed. Below this, there is a label "Delimit on" followed by a date input field containing "03/31/2010". At the bottom of the dialog, there are three buttons: "Yes", "No", and "Cancel" (which has a red 'X' icon next to it).

Contract Elements (0016)



The *Contract Elements* infotype tracks an employee's state status (permanent or non-permanent).

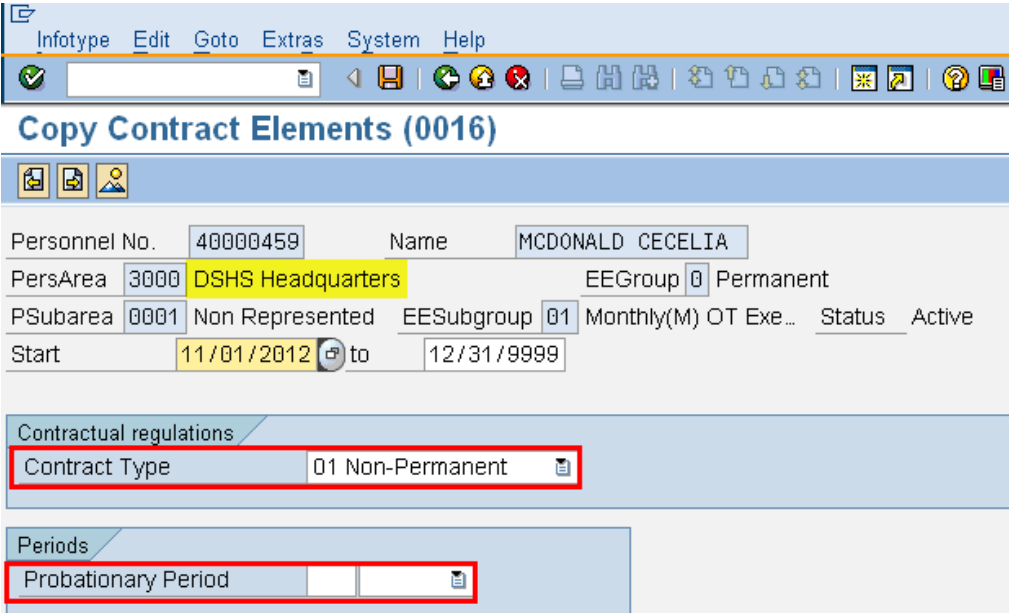
■ Fields required to complete:

– **Contract type**

■ Optional field

– **Probationary period**

■ When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Copy Contract Elements (0016)

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 3000 DSHS Headquarters EGroup 0 Permanent

PSubarea 0001 Non Represented ESubgroup 01 Monthly(M) OT Exe... Status Active

Start 11/01/2012 to 12/31/9999



Contractual regulations

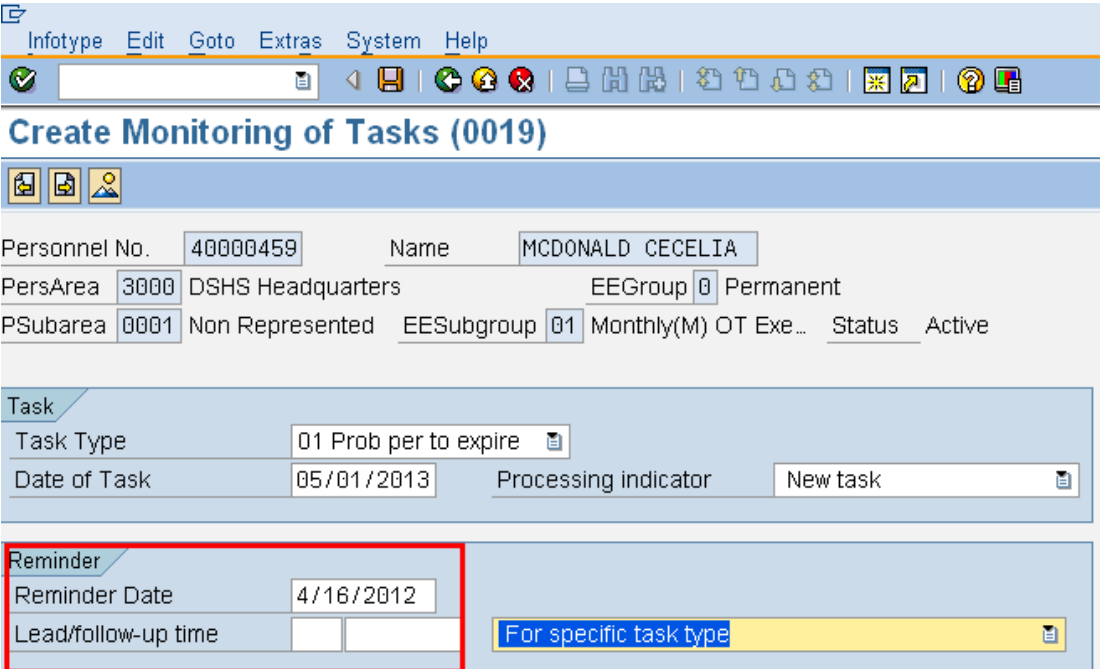
Contract Type 01 Non-Permanent

Periods

Probationary Period

Monitoring of Task (0019)

- The *Monitoring of Tasks* infotype tracks the dates on which an employee moves from non-permanent status to permanent status.
- Fields to complete:
 - **Date of Task**
 - **Processing indicator**
 - **Reminder Date**
- When finished, click  (**Enter**) and then click  (**Save**).



Infotype Edit Goto Extras System Help

Create Monitoring of Tasks (0019)

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Task

Task Type 01 Prob per to expire

Date of Task 05/01/2013 Processing Indicator New task



Reminder

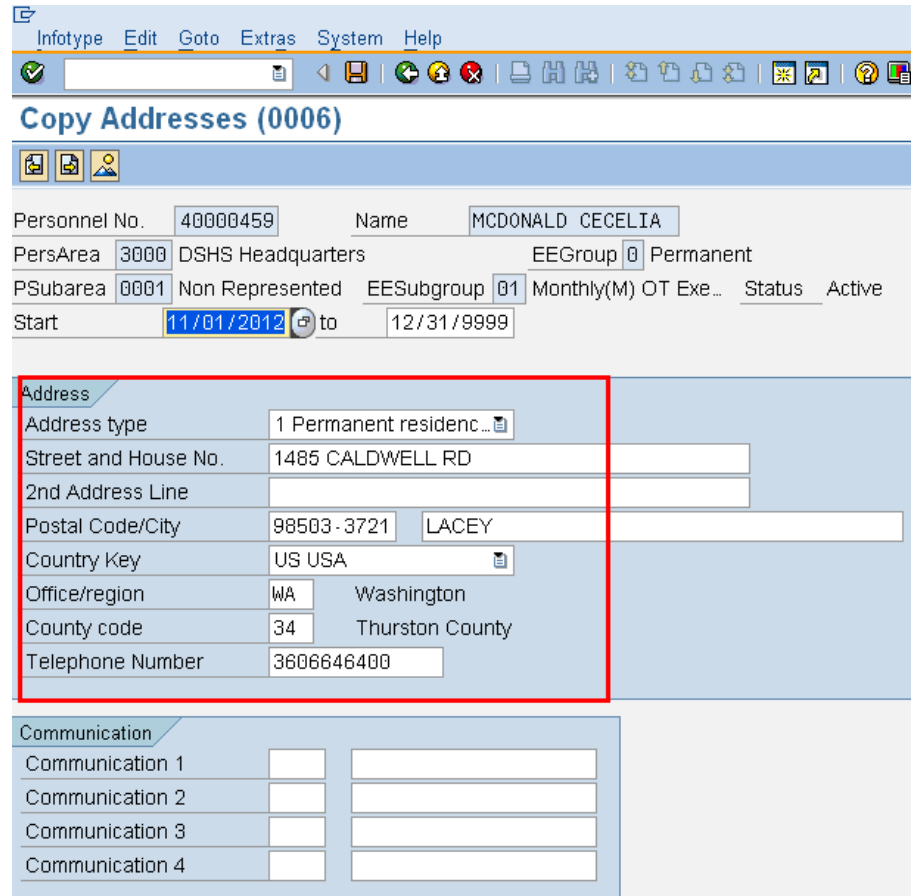
Reminder Date 4/16/2012

Lead/follow-up time

For specific task type

Addresses (0006)

- For a rehire, verify and update any data on this infotype.
- When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Copy Addresses (0006)

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 3000 DSHS Headquarters EESubgroup 01 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 11/01/2012 to 12/31/9999

Address

Address type 1 Permanent residenc...

Street and House No. 1485 CALDWELL RD

2nd Address Line

Postal Code/City 98503-3721 LACEY

Country Key US USA

Office/region WA Washington



County code 34 Thurston County

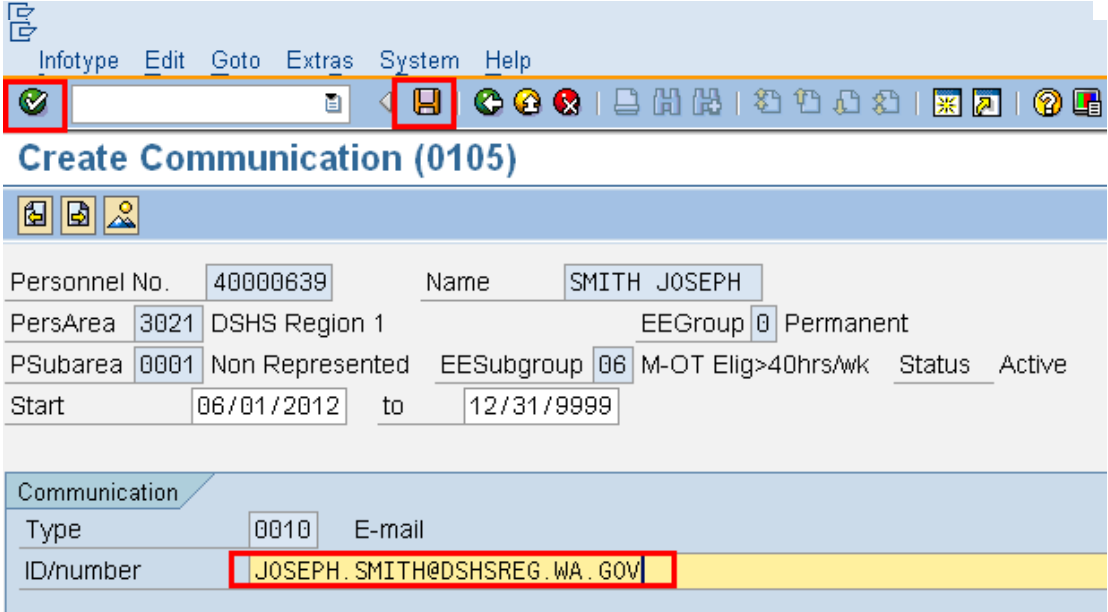
Telephone Number 3606646400

Communication

Communication 1		
Communication 2		
Communication 3		
Communication 4		

Communications (0105)

- The communications infotype is used to establish the employee's email address to be used.
- Field to complete:
 - ID/number
- When finished, click **(Enter)**  and then click **(Save)**. 



Infotype Edit Goto Extras System Help

Create Communication (0105)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

Communication

Type 0010 E-mail

ID/number JOSEPH.SMITH@DSHSREG.WA.GOV

Note:

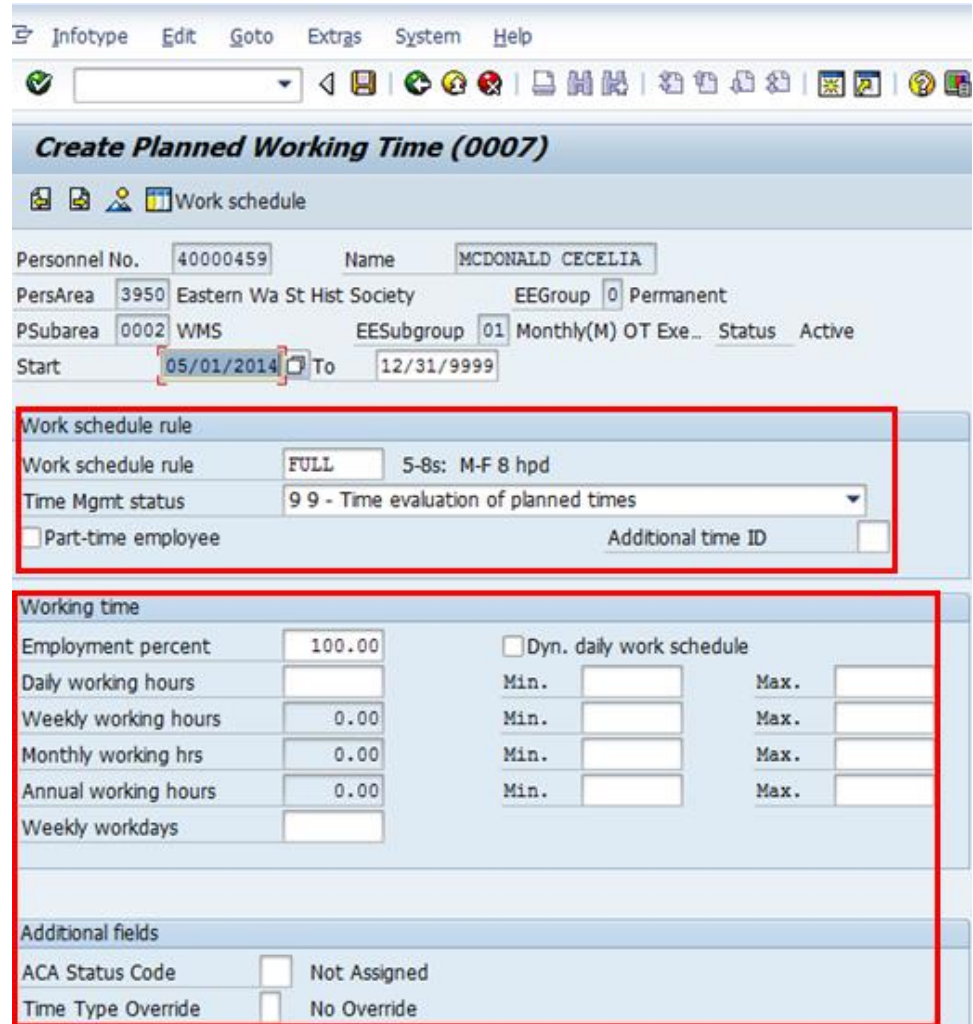
If you do not know the employee's email address at time of hire, click the **next** record button to move to next infotype.

Planned Working Time (0007)

■ Fields to verify/complete:

- **Work schedule rule**
 - Full – M-F 5-8s (Default)
- **Time Mgmt status**
 - 9 9 Time evaluation of planned times (Default)
- **Additional time ID**
 - Defaults to blank
- **Employment percent**
100 (Default)
- **ACA Status Code**
- **Time Type Override***

- ## ■ When finished, click (Enter) and then click (Save).



Infotype Edit Goto Extras System Help

Create Planned Working Time (0007)

Work schedule

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 3950 Eastern Wa St Hist Society EEGroup 0 Permanent

PSubarea 0002 WMS EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 05/01/2014 To 12/31/9999

Work schedule rule

Work schedule rule FULL 5-8s: M-F 8 hpd

Time Mgmt status 9 9 - Time evaluation of planned times

☐ Part-time employee Additional time ID

Working time

Employment percent 100.00 ☐ Dyn. daily work schedule

Daily working hours Min. Max.

Weekly working hours Min. Max.

Monthly working hrs Min. Max.

Annual working hours Min. Max.

Weekly workdays Min. Max.

Additional fields



ACA Status Code ☐ Not Assigned


Time Type Override ☐ No Override

* Note:

The Time Type Override box is to only be used by agencies who intend to use TLA

Education (0022)

- Use the Education infotype to document the details regarding education the employee has received.
- When finished, click  (Enter) and then click  (Save).

Note: To skip this infotype, click  (close) to move to the next infotype.

Subtypes for infotype "E"

Restrictions

EE Educ. est. text

01 High School or GED

02 Voc School w/o HS

03 Voc. or Bus. School

04 Some College-2Qtrs+

05 AA Degree

06 Col Grad 4 Yr Degree

07 Some Grad Work

08 MA/MS/MSW Degree

09 Other Master Degree

Infotype Edit Goto Extras System Help

Create Education

Personnel No. 40000459 Name MCDONALD CELIA

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exempt Status Active

Start ☒ to ☒

Educational est. 01 High School or GED

Education/training

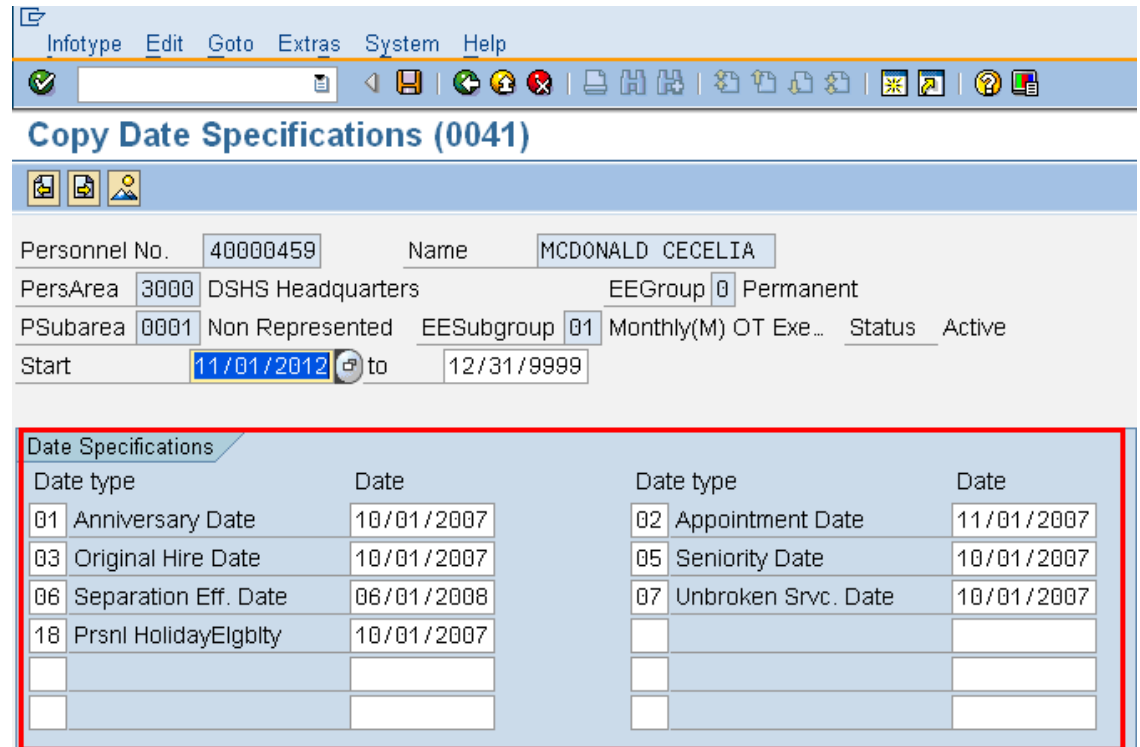
Institute/location

Country Key US USA

Certificate

Date Specifications (0041)

- The Date Specifications infotype documents important dates in employment history.
- All previous dates will default and may need adjustments:
 - Anniversary Date
 - Appointment Date
 - Original Hire Date
 - Seniority Date
 - Unbroken Srv. Date
 - Prsnl Holiday Eligibility



Infotype Edit Goto Extras System Help

Copy Date Specifications (0041)

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 11/01/2012 to 12/31/9999


Date Specifications	
Date type	Date
01 Anniversary Date	10/01/2007
03 Original Hire Date	10/01/2007
06 Separation Eff. Date	06/01/2008
18 Prsnl HolidayElgblty	10/01/2007
02 Appointment Date	11/01/2007
05 Seniority Date	10/01/2007
07 Unbroken Srv. Date	10/01/2007

Date Specifications (0041) – cont'd

Date Specifications	
Date type	Date
01 Anniversary Date	10/01/2007
03 Original Hire Date	10/01/2007
06 Separation Eff. Date	06/01/2008
09 Vac Lv Frozen UpTo	06/01/2010



Date type	Date
02 Appointment Date	11/01/2007
05 Seniority Date	10/01/2007
07 Unbroken Svc. Date	10/01/2007
18 Prsnl HolidayElgblty	10/01/2007

■ If necessary, create the date type Vac Lv Frozen Up to.














1. Click the  (matchcode) in the next available Date type field to open selection list.
2. Double-click to select.
3. Enter the date eligible.

Note: Remove the Separation Effective Date (Date Type 06).




Date Specifications (0041) – cont’d

- When finished, click  (Enter) and then click  (Save).

Infotype Edit Goto Extras System Help



Copy Date Specifications (0041)



Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 11/01/2012 to 12/31/9999




Date Specifications

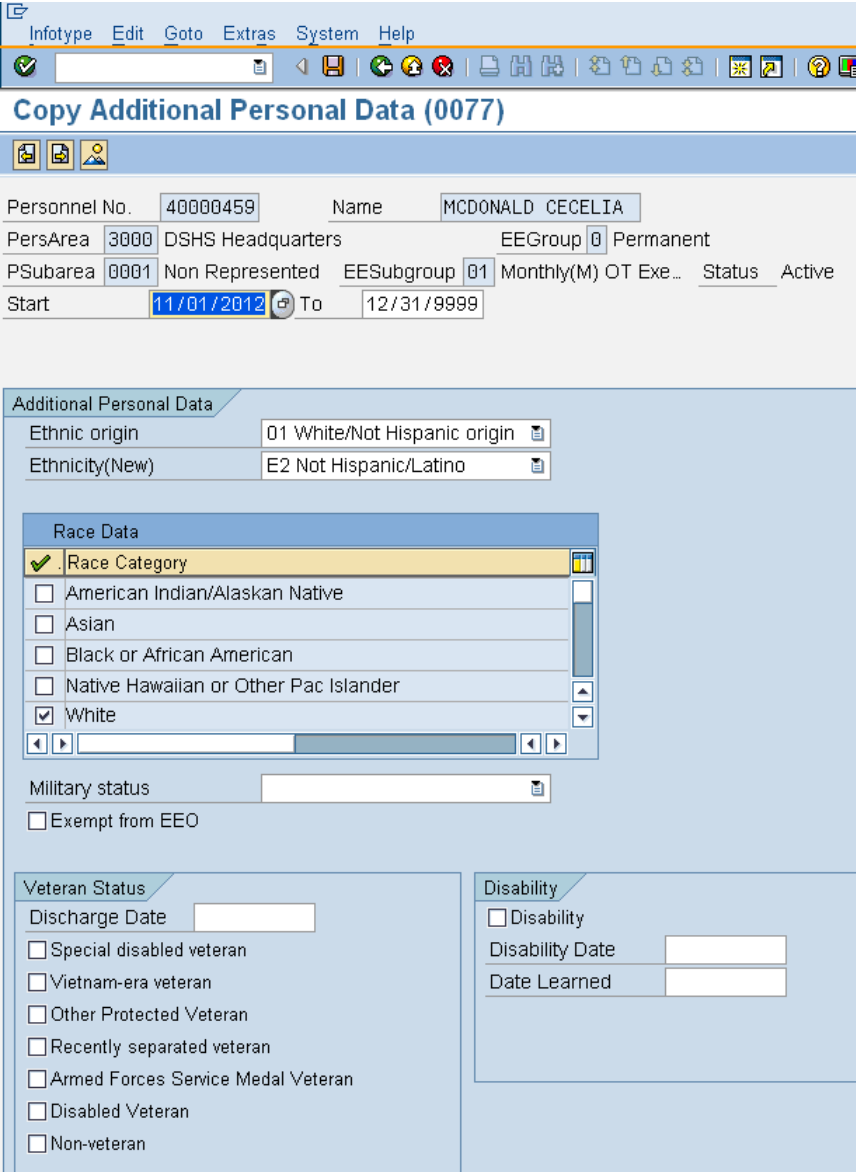
Date type	Date	Date type	Date
01 Anniversary Date	10/01/2007	02 Appointment Date	11/01/2007
03 Original Hire Date	10/01/2007	05 Seniority Date	10/01/2007
07 Unbroken Svc. Date	10/01/2007	18 Prsnl HolidayElgblty	10/01/2007

Adjusting Service Dates – Rehire

- When performing a Rehire action, adjust the service dates for an employee. This is not an automated process in HRMS and must be done manually.
- Updates are needed:
 - For retirement benefits for employees who have worked for other covered jurisdictions, higher education institutions, or have served in the military.
 - To accrue seniority for full-time employees based on seniority dates or union contracts.
 - To ensure accuracy of employee data when layoffs are needed.
- Before adjusting service dates, refer to WAC, Agency Policy, and CBA's for rules on updating date specifications.

Additional Personal Data (0077)

- The Additional Personal Data infotype documents an employee's Equal Employment Opportunity (EEO) information.
- For a rehire, verify and correct any data on this infotype.
- When finished, click  (Enter) and then click  (Save). If information is correct, do not save and click  (Next Record).



Infotype Edit Goto Extras System Help

Copy Additional Personal Data (0077)

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 11/01/2012 To 12/31/9999

Additional Personal Data

Ethnic origin 01 White/Not Hispanic origin

Ethnicity(New) E2 Not Hispanic/Latino

Race Data

☒ Race Category

☐ American Indian/Alaskan Native

☐ Asian

☐ Black or African American

☐ Native Hawaiian or Other Pac Islander

☒ White

Military status

☐ Exempt from EEO

Veteran Status

Discharge Date

☐ Special disabled veteran

☐ Vietnam-era veteran

☐ Other Protected Veteran

☐ Recently separated veteran

☐ Armed Forces Service Medal Veteran

☐ Disabled Veteran

☐ Non-veteran

Disability

☐ Disability



Disability Date

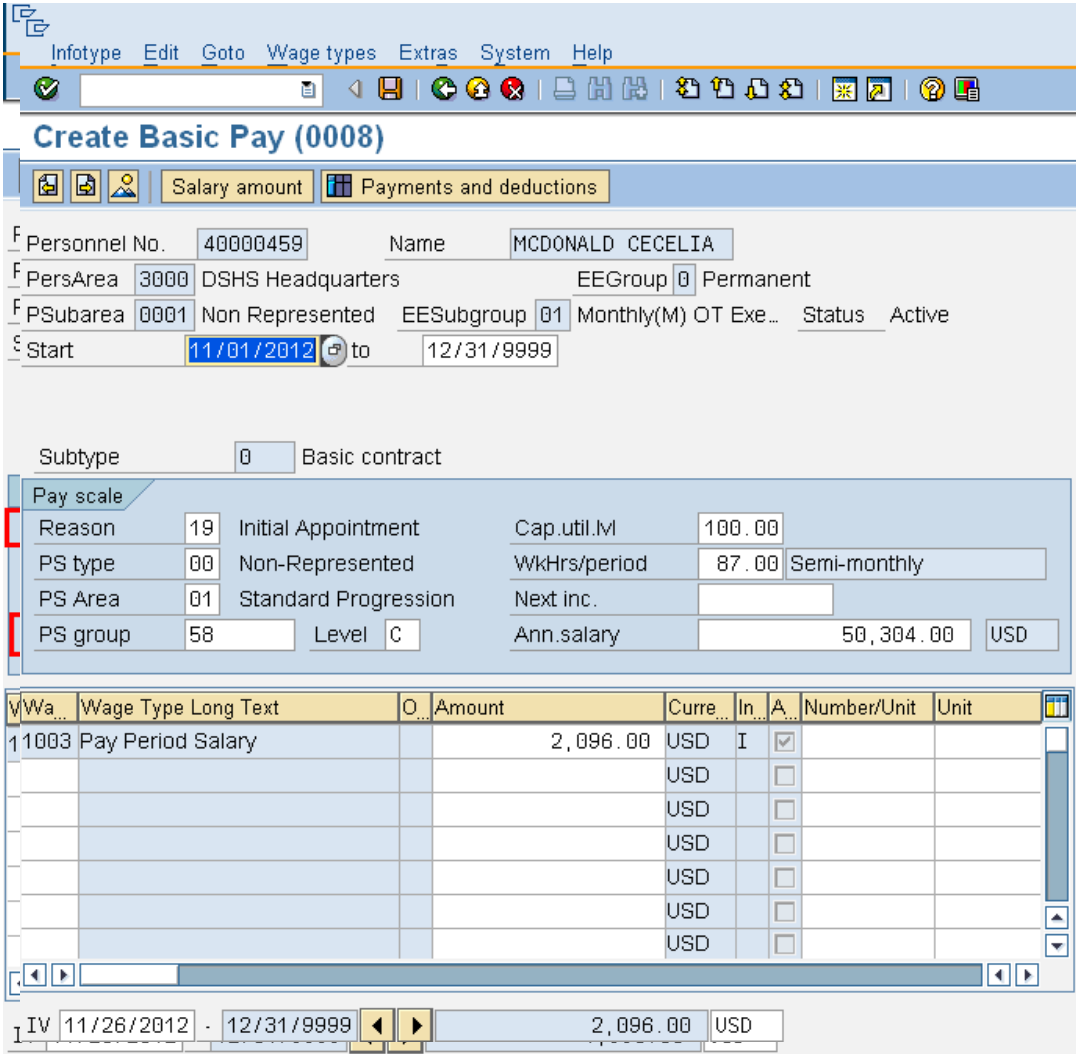
Date Learned

Basic Pay (IT00008)

■ The *Basic Pay* infotype records pay scale and salary information for an employee.

- Fields to complete:
- Reason
 - Next Increase
 - PS Level
 - Capacity utility level
(Defaults in)

■ When finished, click  (Enter) and then click  (Save).



Create Basic Pay (0008)

Personnel No. 40000459 Name MCDONALD CECELIA

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSArea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 11/01/2012 to 12/31/9999

Subtype 0 Basic contract

Pay scale

Reason	19	Initial Appointment	Cap.util.M	100.00
PS type	00	Non-Represented	WkHrs/period	87.00 Semi-monthly
PS Area	01	Standard Progression	Next inc.	
PS group	58	Level C	Ann.salary	50,304.00 USD

Wage Type Long Text	Amount	Currency	In	A	Number/Unit	Unit
11003 Pay Period Salary	2,096.00	USD	I	<input checked="" type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		

IV 11/26/2012 - 12/31/9999 2,096.00 USD

Note: If the employee is eligible for a periodic increment (PID) or longevity step, and moves to a new Pay Scale Type, Pay Scale Area, Pay Scale Group or Pay Scale Level, the agency **HR Processors must** input the employee's current PID in the Next Increase field on the Basic Pay Infotype.

Personnel Administration / Payroll Handoff

- After all personnel updates are made to the employee's information, it is transferred to the Payroll Processor.
- The Payroll Processor records the following infotypes:
 - *Bank Details (0009)*
 - *Recurring Payments / Deductions (0014)*
 - *Withholding Info W4/W5 US (0210)*
 - *Additional Withholding Info Us (0234)*
 - *General Benefits Information (0171)*



HRMS Activity



Rehire an Employee

Review Questions

- What is the difference between a new hire and a rehire?

- True or False – During the Rehire action, it is necessary to re-create all employee infotypes in HRMS?

Change of Status

Change of Status Overview

Upon completion of this section you will be able to:

- Define the key terms and concepts associated with the Change of Status action.
- Navigate through the Change of Status infotypes and understand the importance of the information in each infotype.
- Review a Change of Status action.

Change of Status

A **Change of Status** occurs when an employee has reach the end of their probationary appointment or has completed their in-training appointment.

■ End of Probationary Appointment

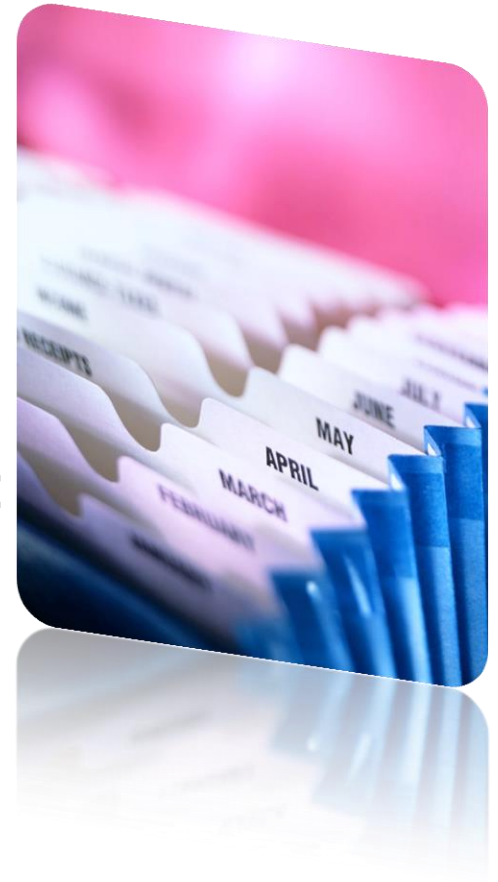
- When an employee reaches the end of their probationary period, their status is changed to ‘permanent’.

■ Completion of In-training Appointment

- When an employee completes their In-training Probationary Appointment at a lower job class level, their status is changed to ‘trial service’.
 - In-training appointments may consist of multi-levels in which the status would be changed to ‘In-training/Trial Service’.

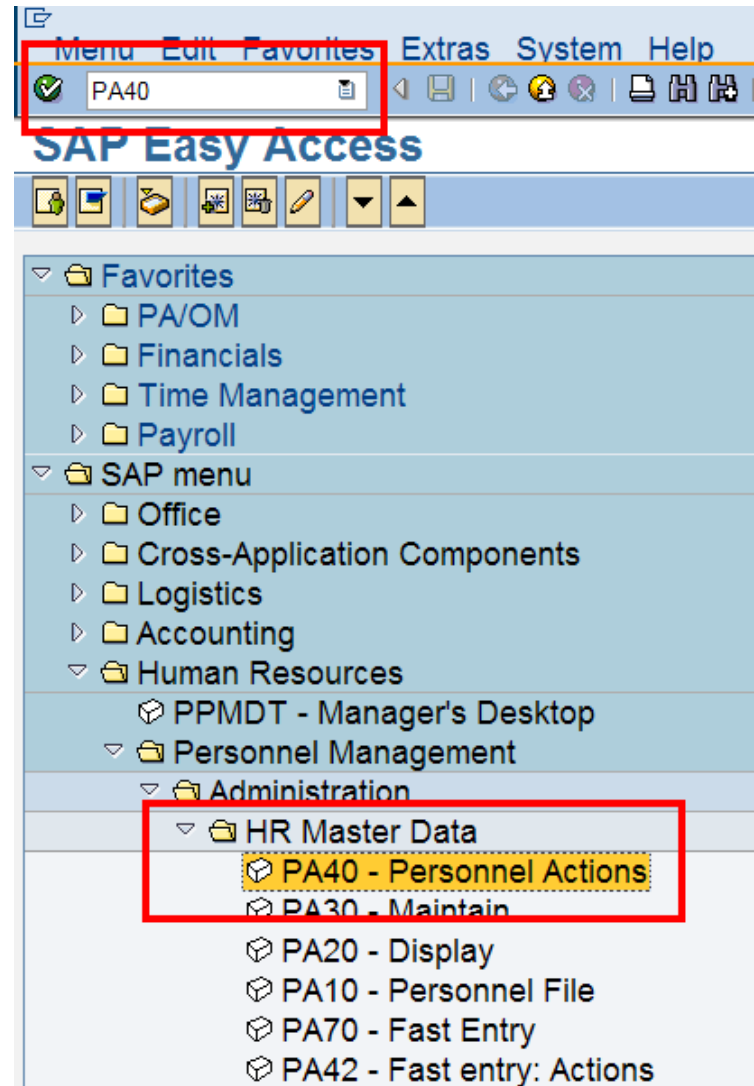
Change of Status Infotypes

- Update the following infotypes during the Change of Status action:
 - *Actions* (0000)
 - *Organizational Assignment* (0001)
 - *Contract Elements* (0016)
- Use **PA30** to maintain the following infotype:
 - *Monitoring of Task* (0019)



Change of Status

- To create a Change of Status Action using the menu path:
 - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
 - Or enter transaction code **PA40** in the **Command** field



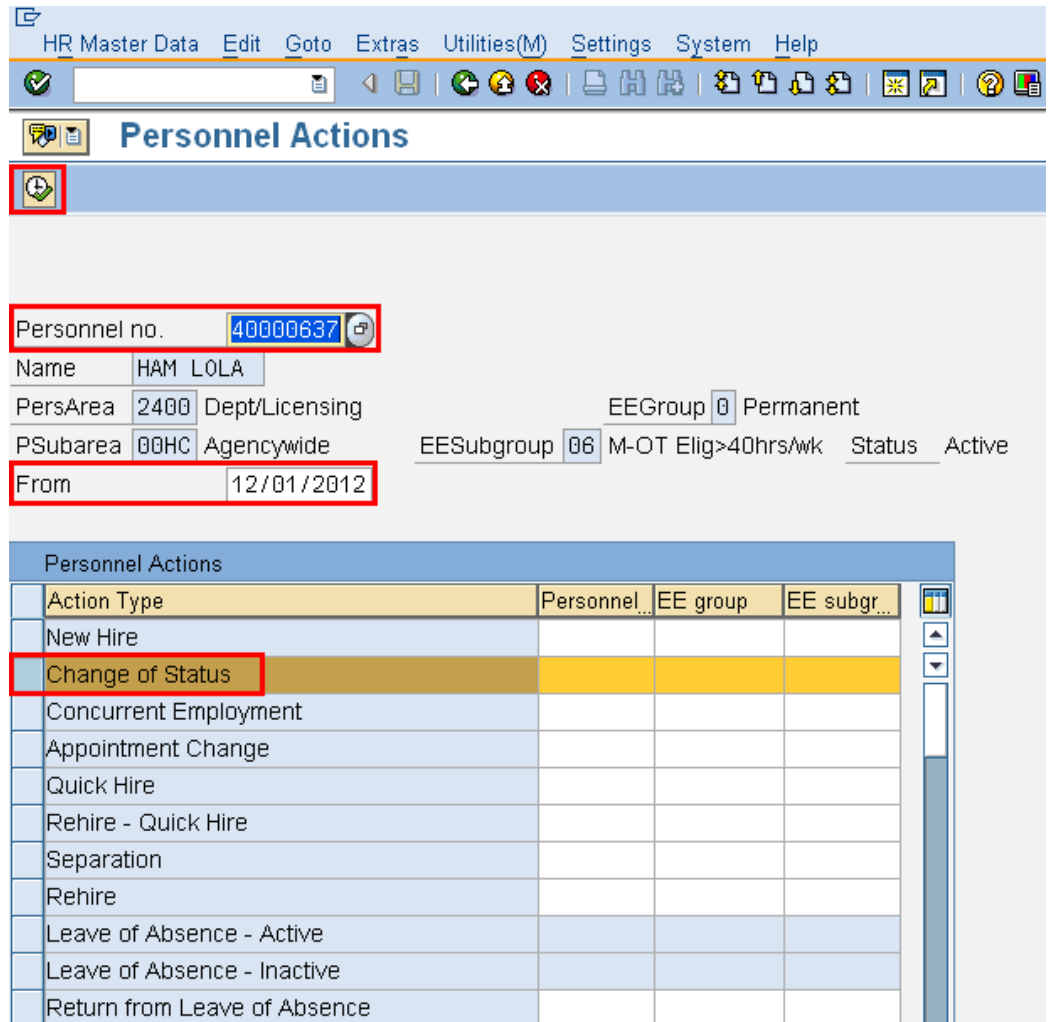
Change of Status Personnel Action

■ Fields to complete:

- **From** (Date of action)
- **Personnel no.**


■ To access the Change of Status action, click the box to the left of Change of Status.

■ Then click (Execute).



HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions



Personnel no. 40000637

Name HAM LOLA

PersArea 2400 Dept/Licensing

PSubarea 00HC Agencywide



From 12/01/2012

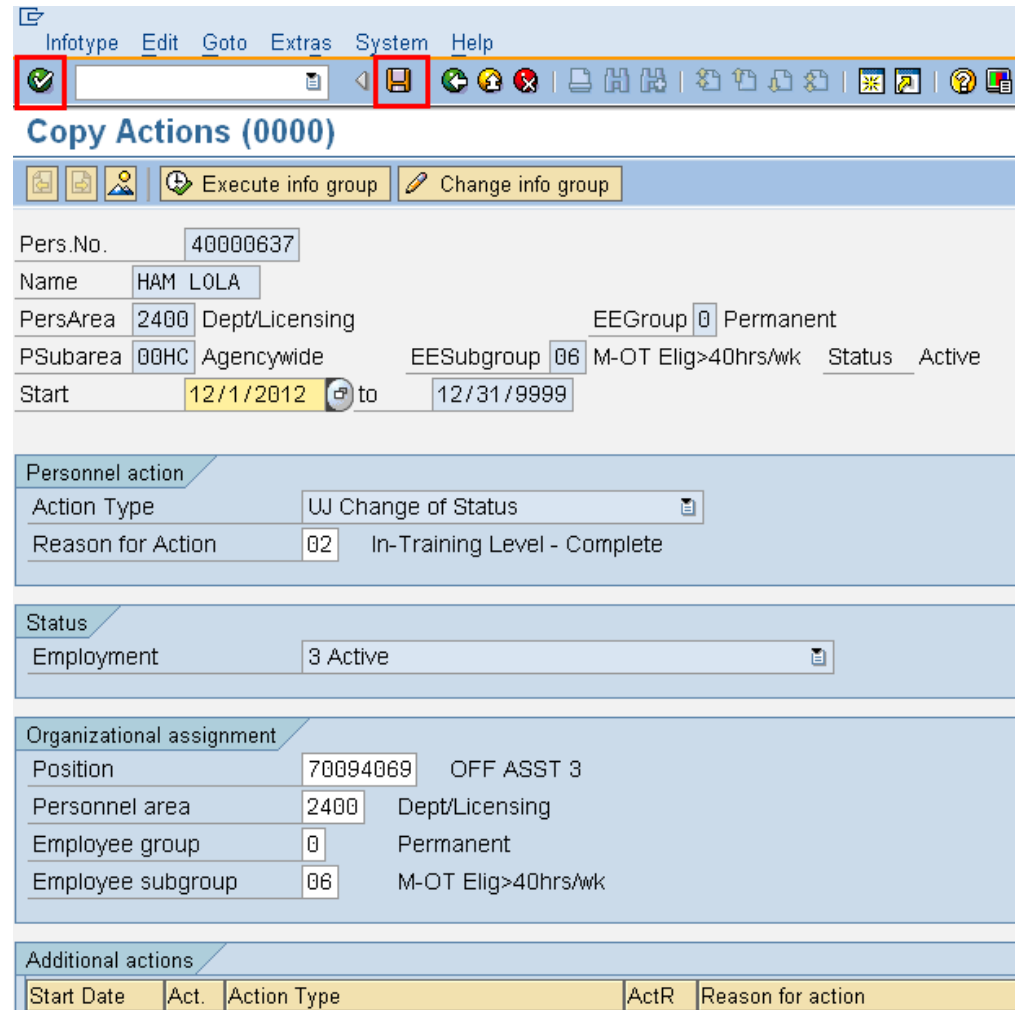
EEGroup 0 Permanent

EESubgroup 06 M-OT Elig>40hrs/wk Status Active



Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

Actions (0000)






- Fields to complete
 - Reason for Action (use matchcode)
- When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Copy Actions (0000)

    Execute info group  Change info group

Pers.No. 40000637
Name HAM LOLA
PersArea 2400 Dept/Licensing EEGroup 0 Permanent
PSubarea 00HC Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Start 12/1/2012 to 12/31/9999

Personnel action
Action Type UJ Change of Status
Reason for Action 02 In-Training Level - Complete

Status
Employment 3 Active

Organizational assignment
Position 70094069 OFF ASST 3
Personnel area 2400 Dept/Licensing
Employee group 0 Permanent
Employee subgroup 06 M-OT Elig>40hrs/wk

Additional actions



Start Date	Act.	Action Type	ActR	Reason for action
------------	------	-------------	------	-------------------

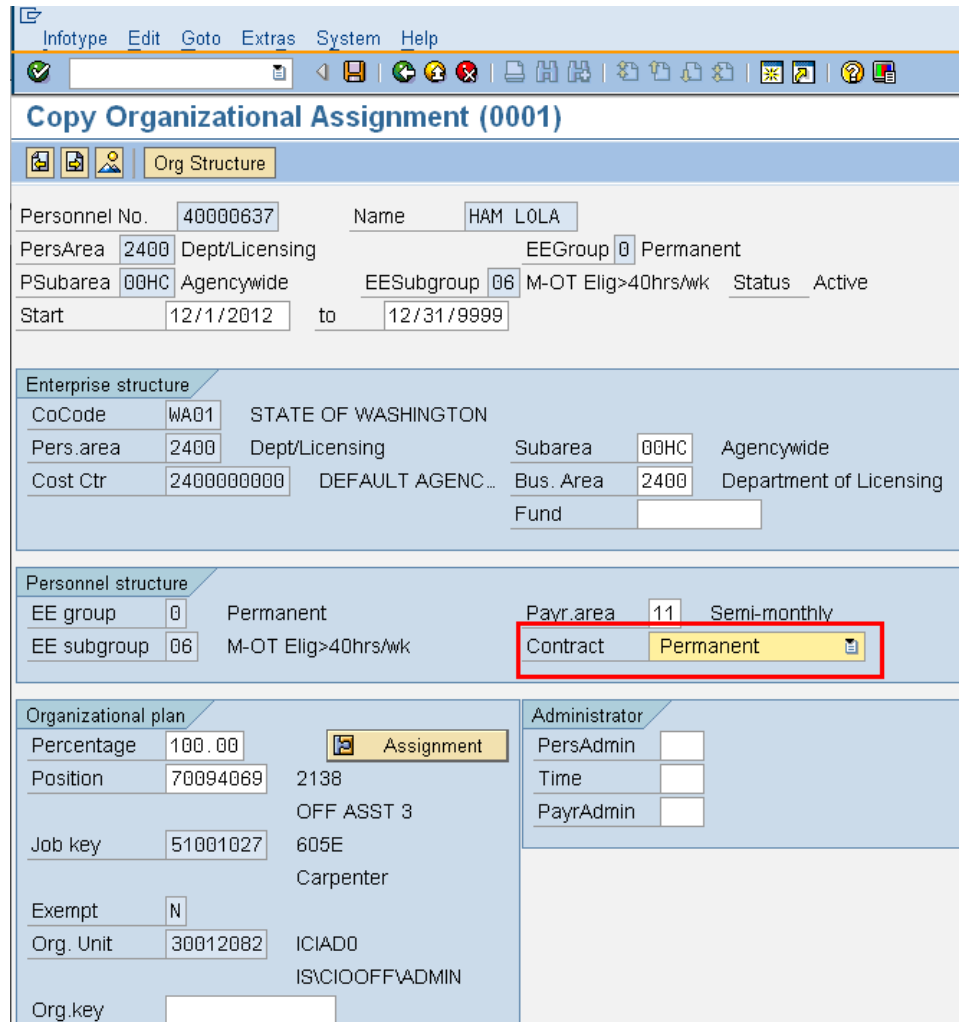
Organizational Assignment (0001)

■ Field to complete:

– **Contract**

▪ Permanent

■ When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No. 40000637 Name HAM LOLA

PersArea 2400 Dept/Licensing EEGroup 0 Permanent

PSubarea 00HC Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 12/1/2012 to 12/31/9999

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 2400 Dept/Licensing Subarea 00HC Agencywide

Cost Ctr 2400000000 DEFAULT AGENC... Bus. Area 2400 Department of Licensing

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 06 M-OT Elig>40hrs/wk **Contract Permanent**

Organizational plan

Percentage 100.00 Assignment

Position 70094069 2138

Job key 51001027 605E Carpenter

Exempt N

Org. Unit 30012082 ICIADO ISYCIOFFVADMIN

Org.key

Administrator

PersAdmin

Time

PayrAdmin

Contract Elements (0016)



- The Contract Elements infotype if the employee's state status (permanent or non-permanent).

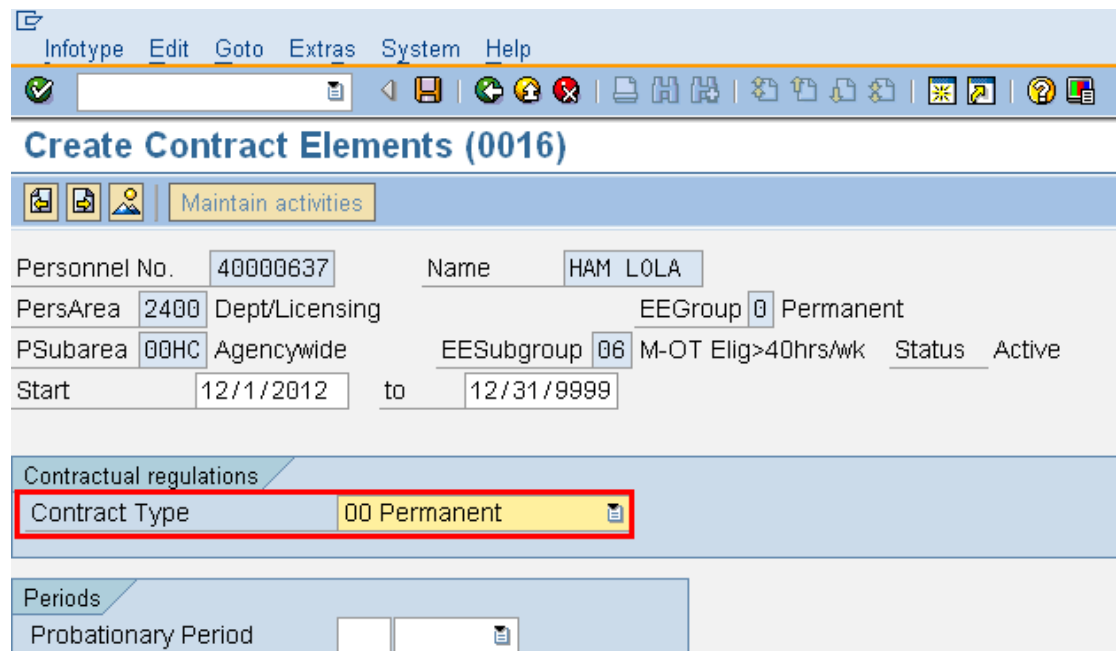
- Fields required to complete:

- **Start**
- **Contract type**

- Optional field:

- Probationary period

- When finished, click  (**Enter**) and then click  (**Save**).



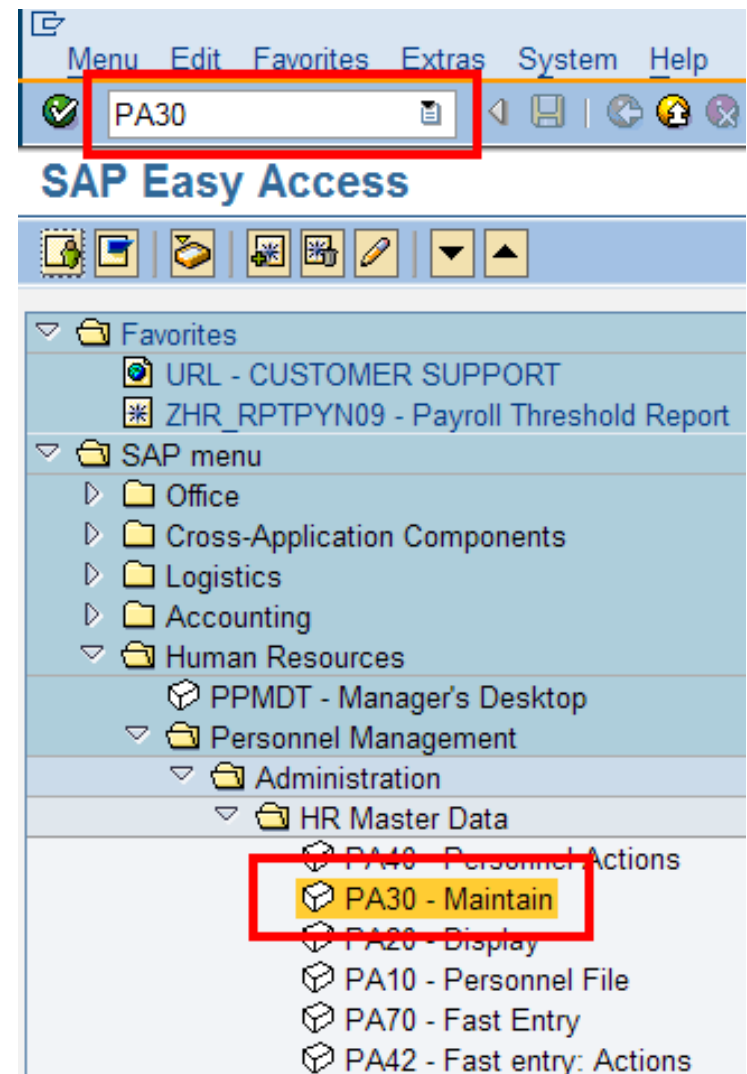
The screenshot shows the 'Create Contract Elements (0016)' form in SAP. The menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The toolbar contains various icons for navigation and actions. The form is titled 'Create Contract Elements (0016)' and has a 'Maintain activities' button. The data fields are as follows:

Personnel No.	40000637	Name	HAM LOLA
PersArea	2400	Dept/Licensing	EEGroup 0 Permanent
PSubarea	00HC	Agencywide	EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Start	12/1/2012	to	12/31/9999

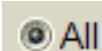

Below the data fields is a section for 'Contractual regulations' with a red border around the 'Contract Type' field, which is set to '00 Permanent'. At the bottom, there is a 'Periods' section with a 'Probationary Period' field.

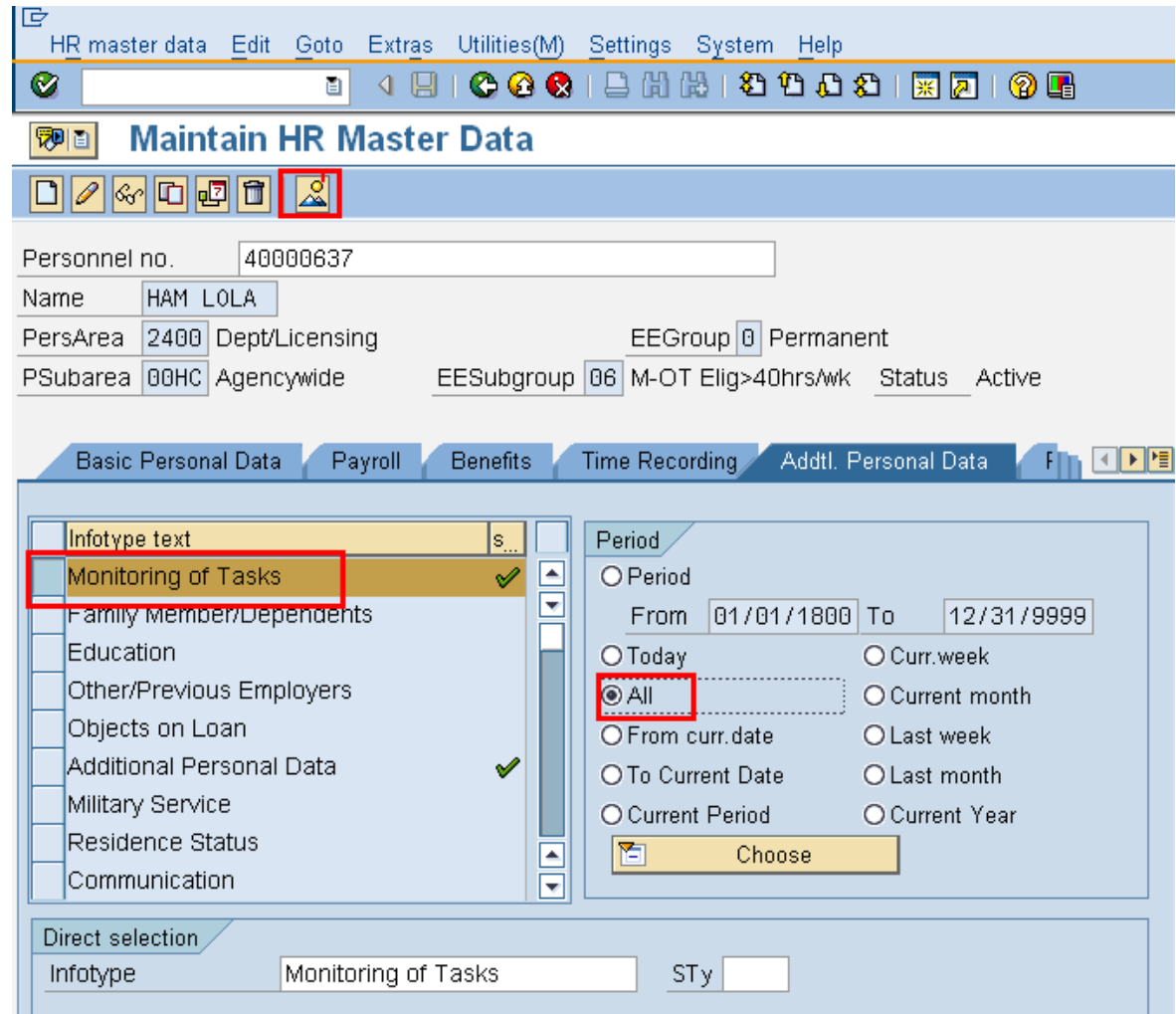
Monitoring of Task (0019)

- When the employee's probation period has ended, the *Monitoring of Task* (0019) must be updated.
- To maintain the Monitoring of Task infotype:
 - Follow menu path: Human Resources → Personnel Management → Administration → HR Master Data → Maintain
 - Or enter transaction code **PA30** in the **Command** field



Maintain *Monitoring of Task* (0019)

- Click the **Addtl. Personal Data** tab.
- Click the box to the left of the *Monitoring of Task* (0019) to select.
- In the 'Period' section, click  (**All**).
- Click  (**Overview**) for an overview of all actions associated with the *Monitoring of Tasks* (0019).



HR master data Edit Goto Extras Utilities(M) Settings System Help

Maintain HR Master Data

Personnel no. 40000637

Name HAM LOLA

PersArea 2400 Dept/Licensing EEGroup 0 Permanent

PSubarea 00HC Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Basic Personal Data Payroll Benefits Time Recording **Addtl. Personal Data**

Infotype text s...

Monitoring of Tasks ✓

Family Member/Dependents

Education

Other/Previous Employers

Objects on Loan

Additional Personal Data ✓

Military Service

Residence Status

Communication

Period

☐ Period

From 01/01/1800 To 12/31/9999

☐ Today ☐ Curr.week

☒ **All** ☐ Current month

☐ From curr.date ☐ Last week

☐ To Current Date ☐ Last month

☐ Current Period ☐ Current Year

Choose

Direct selection

Infotype Monitoring of Tasks STy

Monitoring of Task (0019)

Select the appropriate record.

- **Task Type**

- Prob per to expire



Click  (**Change**)

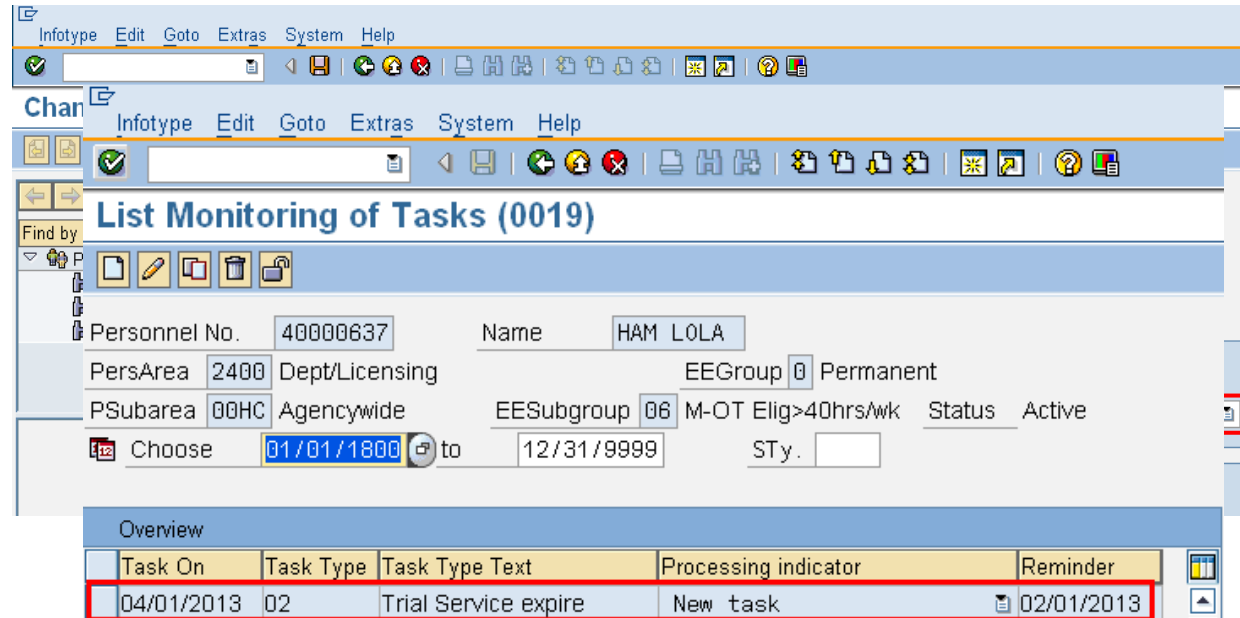
Fields to complete:

- **Date of Task**

- **Processing indicator**

- *Task Completed*

When finished, click  (**Enter**) and then click  (**Save**).



Task On	Task Type	Task Type Text	Processing indicator	Reminder
04/01/2013	02	Trial Service expire	New task	02/01/2013

HRMS Activity



Process Employee Change of Status

Appointment Change

Appointment Change Overview

- Upon completion of this section, you will be able to:
 - Describe the key terms and concepts associated with the Appointment Change action.
 - Navigate through the Appointment Change action and understand the importance of the information in each infotype.
 - Process an Appointment Change action.

Employee Appointment Change

- Use the Appointment Change action for appointments within the agency and appointments between different agencies.
 - Examples include:
 - Promotion
 - Demotion
 - Transfer
 - Reassignment
 - Reallocations



Appointment Change Action

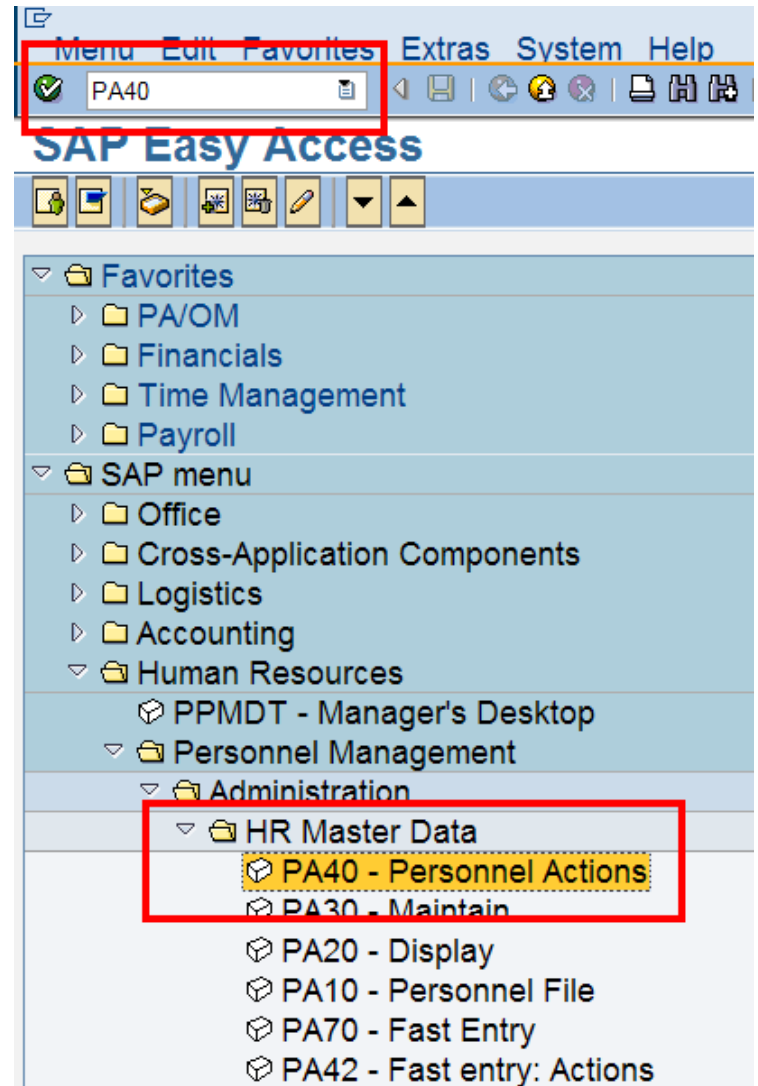
- The information between the losing agency and the gaining agency can be communicated in a number of ways, depending on agency policy.
- Future leave entries must be deleted prior to the gaining agency keying in the Appointment Change. It is important to contact the losing agency to check for future leave entries.
- Employee's information is populated and can be updated once the gaining agency keys the Appointment change.

Appointment Change Infotypes


- Update the following infotypes during the Appointment Change action including:
 - *Actions (0000)*
 - *Organizational Assignment (0001)*
 - *Cost Distribution (0027)*
 - *Contract Elements (0016)*
 - *Monitoring of Tasks (0019)*
 - *Planned Working Time (0007)*
 - *Date Specifications (0041)*
 - *Basic Pay (0008)*

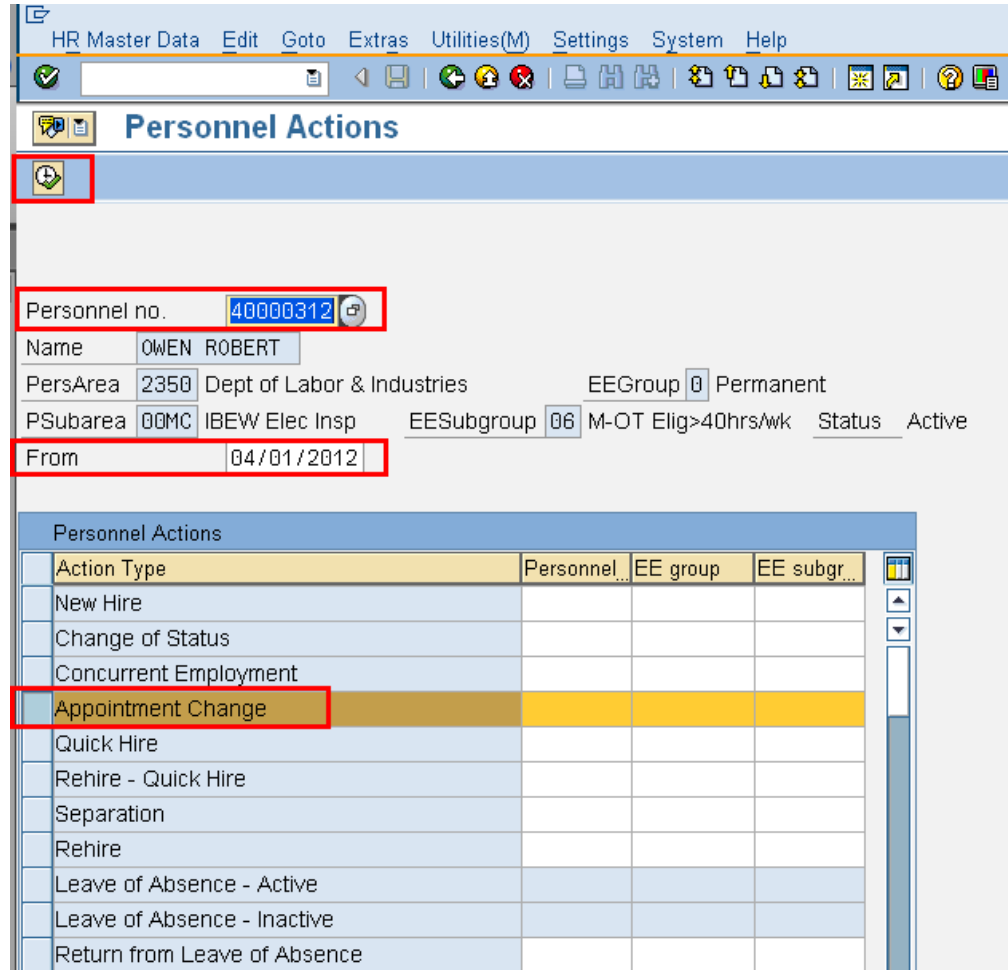
Appointment Change Action

- To create an Appointment Change Action using the menu path:
 - Follow Human Resources
→ Personnel Management
→ Administration → HR
Master Data → Personnel
Actions
 - Or enter transaction code **PA40** in the **Command** field



Appointment Change Personnel Action

- A Personnel Number is required to process an Appointment Change.
- To access the Appointment Change action, click the box to the left of *Appointment Change*.
- Fields to complete-
 - **From** (*Date of Hire*)
 - **Personnel no.**
- Then click  (**Execute**).



HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Personnel no. 40000312

Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

From 04/01/2012

Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

Actions Infotype (0000)

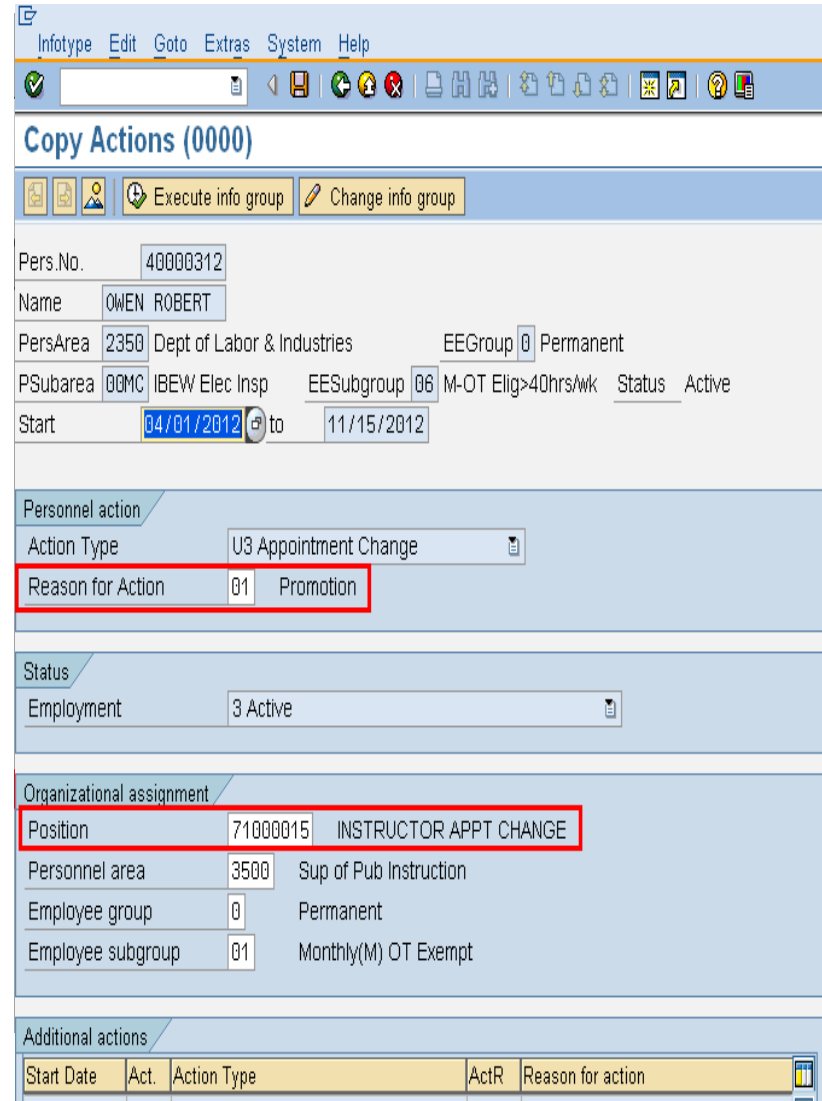
■ Fields to complete:

- Reason for Action (use matchcode)
- Position

■ Click (Enter) to validate and populate the following fields:

- Personnel Area
- Employee Group
- Employee Sub-group

■ When finished, click (**Enter**) and then click (**Save**).



Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000312

Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 04/01/2012 to 11/15/2012

Personnel action

Action Type U3 Appointment Change

Reason for Action 01 Promotion

Status

Employment 3 Active

Organizational assignment

Position 71000015 INSTRUCTOR APPT CHANGE

Personnel area 3500 Sup of Pub Instruction

Employee group 0 Permanent

Employee subgroup 01 Monthly(M) OT Exempt


Additional actions


Start Date	Act.	Action Type	ActR	Reason for action
------------	------	-------------	------	-------------------

Delimit Message

- The delimit message will appear when validating the information entered on the infotype. The message reads “**Record valid from XX/XX/XXXX to XX/XX/XXXX delimited at end**”.

 Record valid from 06/01/2008 to 12/31/9999 delimited at end

- Continue to  **(Enter)** through message until the “Save Your Entries” prompt appears.

 Save your entries

Organizational Assignment (0001)

■ Field required to complete:

– Contract

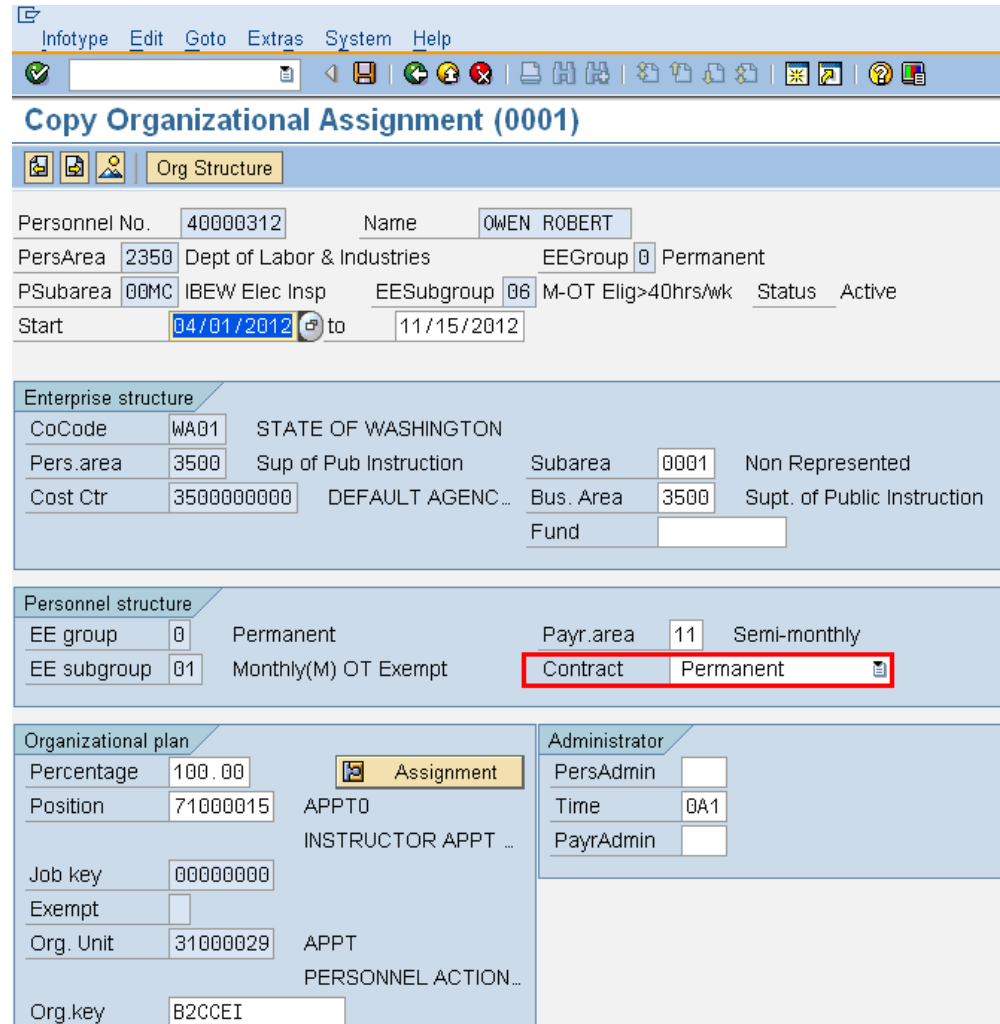
- Permanent

■ Optional fields:

- Org. Key
- Administrator (Time)

■ When finished, click (Enter) and then click (Save).

- If no changes made to the infotype, continue to save.



Infotype Edit Goto Extras System Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 04/01/2012 to 11/15/2012

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 3500 Sup of Pub Instruction Subarea 0001 Non Represented

Cost Ctr 3500000000 DEFAULT AGENC... Bus. Area 3500 Supt. of Public Instruction

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 01 Monthly(M) OT Exempt

Contract Permanent

Organizational plan

Percentage 100.00 Assignment

Position 71000015 APPT0 INSTRUCTOR APPT ...

Job key 00000000

Exempt

Org. Unit 31000029 APPT PERSONNEL ACTION...

Org.key B2CCEI

Administrator

PersAdmin

Time 0A1

PayrAdmin

Delimit / Create Vacancy

A feature used to report vacant positions. Information will be updated on the *Position Vacancy* infotype located in Organizational Management.

- This popup window will appear if the position is vacant or if multi-filled.
- Click 'Yes' to delimit the vacancy.
- Click 'No' to not delimit the vacancy.

Note: If the position is multi-filled select 'No'.

The image shows two overlapping SAP popup windows. The top window is titled 'Delimit Vacancy' and contains the following information:

- Position ID: 71000015
- Position Description: INSTRUCTOR APPT CHANGE
- Delimit on: 03/31/2009
- Buttons: Yes, No, Cancel (with a red X over the Cancel button)

The bottom window is titled 'Create Vacancy' and contains the following information:

- Position ID: 70016262
- Position Description: ELEC CONS INSP
- Create on: 04/01/2009
- Buttons: Yes, No, Cancel (with a red X over the Cancel button)



Contract Elements (0016)

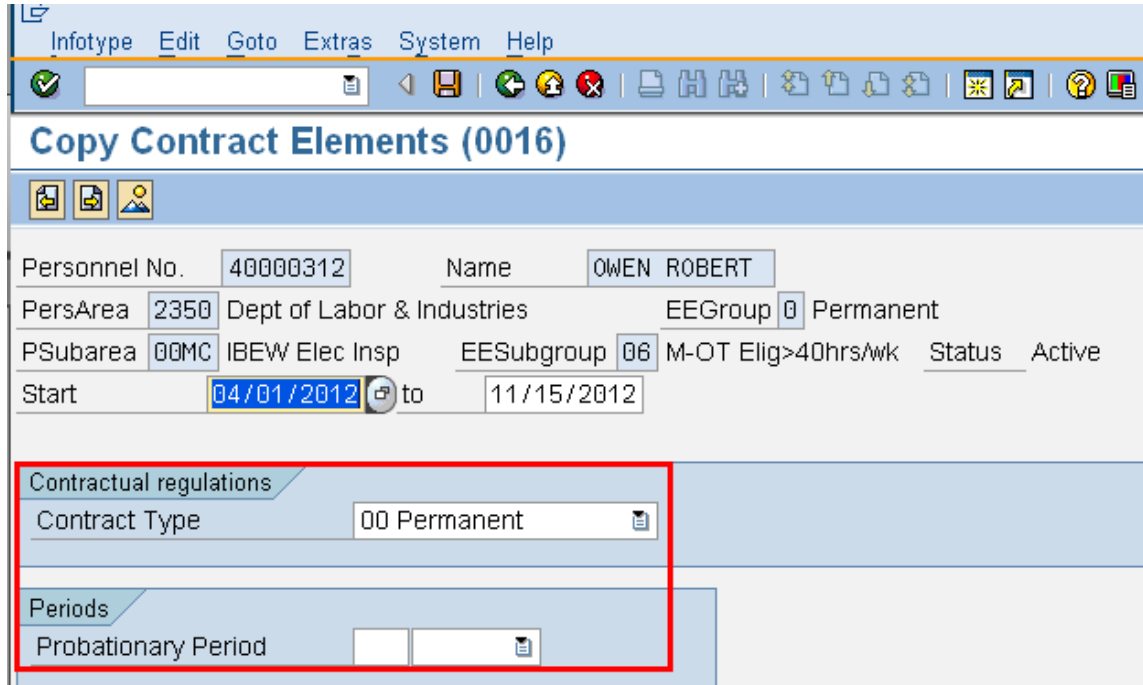
■ Fields required to complete:

– **Contract type**

■ Optional field:

– Probationary period

■ When finished, click  **(Enter)** and then click  **(Save)**.



Infotype Edit Goto Extras System Help

Copy Contract Elements (0016)

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 04/01/2012 to 11/15/2012

Contractual regulations

Contract Type 00 Permanent

Periods



Probationary Period

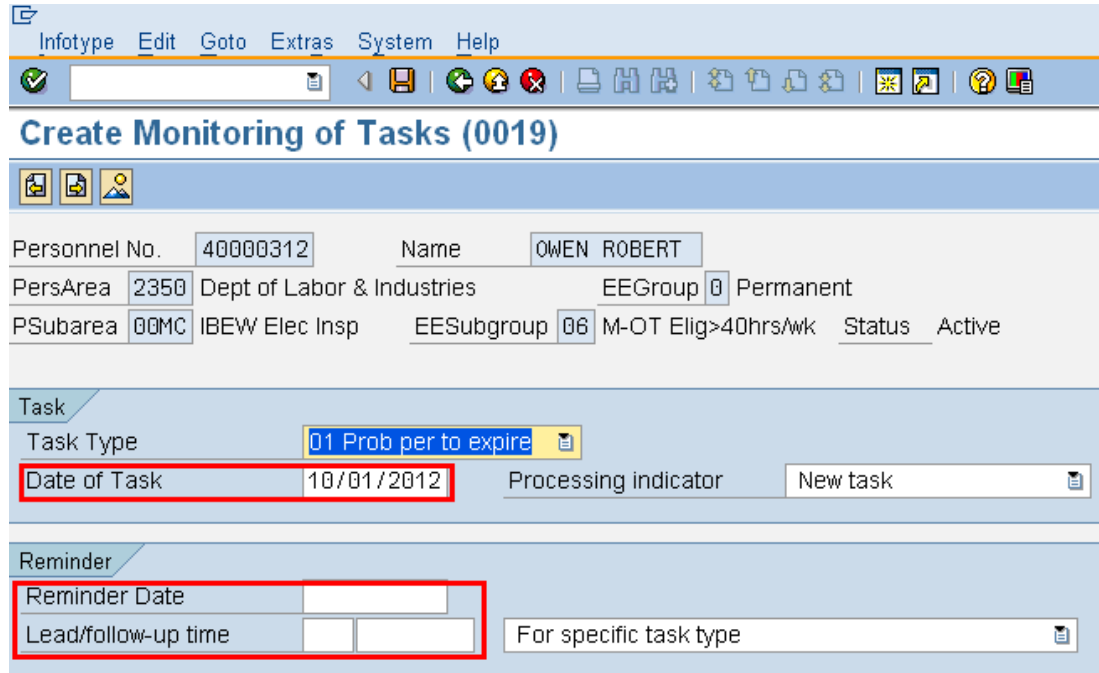
Monitoring of Task (0019)

- The Monitoring of Tasks infotype tracks the dates on which an employee moves from non-permanent status to permanent.

- Fields to complete:

- Task Type
- Reminder Date

- When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Create Monitoring of Tasks (0019)

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Task

Task Type 01 Prob per to expire



Date of Task 10/01/2012 Processing indicator New task

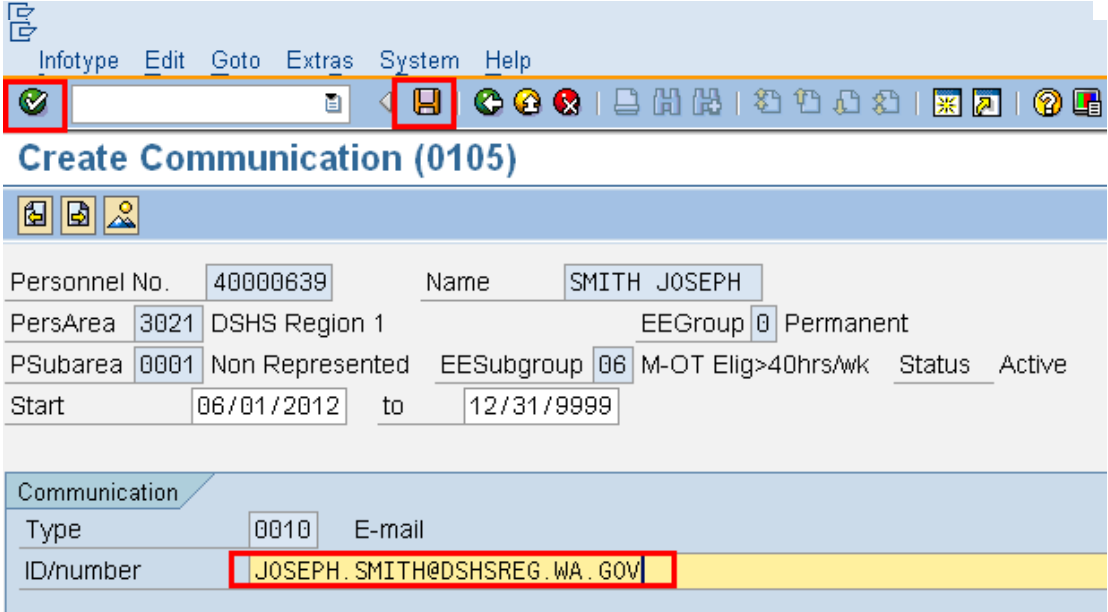
Reminder

Reminder Date

Lead/follow-up time For specific task type

Communications (0105)

- Field to complete:
 - ID/number
- When finished, click **(Enter)**  and then click **(Save)**. 



Infotype Edit Goto Extras System Help

Create Communication (0105)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

Communication

Type 0010 E-mail

ID/number JOSEPH.SMITH@DSHSREG.WA.GOV



Note:

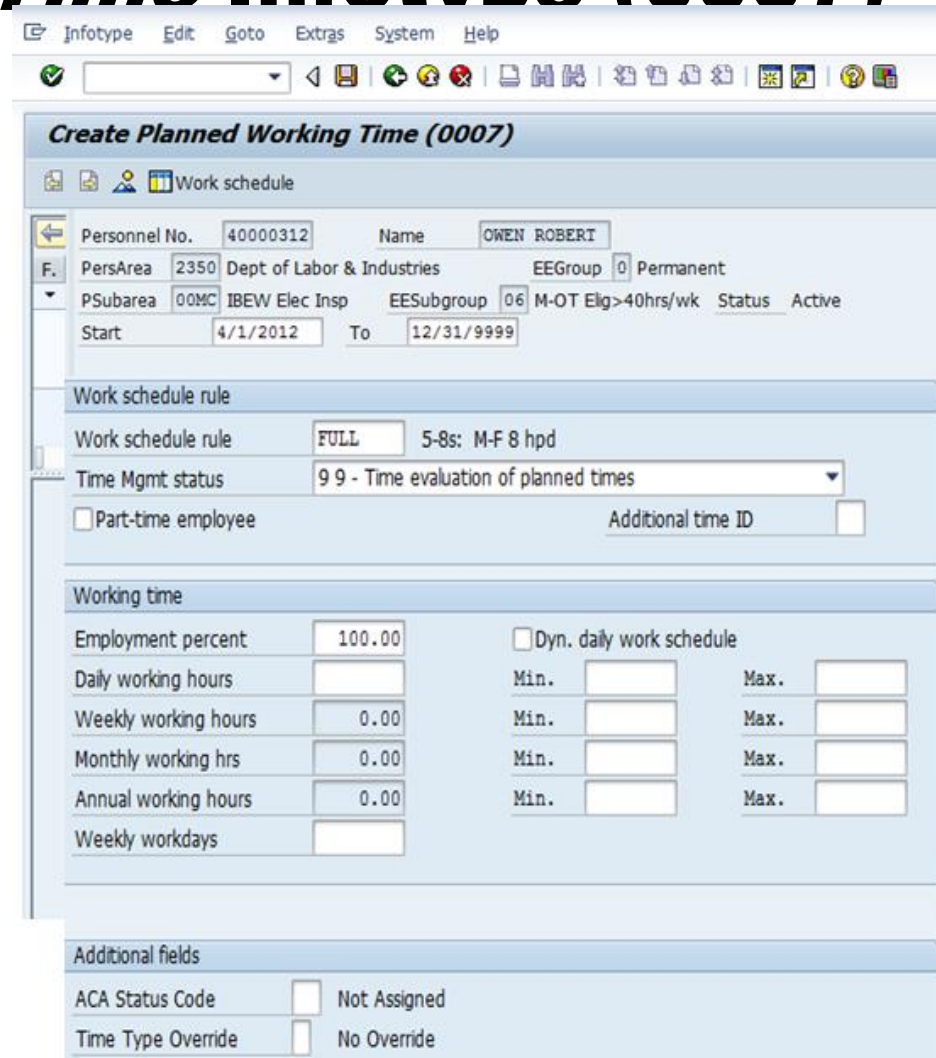
If you do not know the employee's email address at time of hire, click the **next** record button to move to next infotype.

Planned Working Time Infotype (0007)

■ Fields to verify/complete:

- **Work schedule rule**
 - Full 5-8s – M-F (Default)
- **Time Mgmt status**
 - 9 9 Time evaluation of planned times (Default)
- **Additional time ID**
 - Default is blank
- **Employment percent**
 - 100 (Default)
- **ACA Status Code**
- **Time Type Override***

- When finished, click  **(Enter)** and then click  **(Save).**



Create Planned Working Time (0007)

Work schedule

Personnel No. 40000312 Name OWEN ROBERT

F. PersArea 2350 Dept of Labor & Industries EEGGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elg>40hrs/wk Status Active

Start 4/1/2012 To 12/31/9999

Work schedule rule

Work schedule rule FULL 5-8s: M-F 8 hpd

Time Mgmt status 9 9 - Time evaluation of planned times

☐ Part-time employee Additional time ID

Working time

Employment percent 100.00 ☐ Dyn. daily work schedule

Daily working hours	Min.	Max.
Weekly working hours	Min.	Max.
Monthly working hrs	Min.	Max.
Annual working hours	Min.	Max.
Weekly workdays		

Additional fields

ACA Status Code ☐ Not Assigned

Time Type Override ☐ No Override



*** Note:**

The Time Type Override box is to only be used by agencies who intend to use TLA




Date Specifications Infotype (0041)

- The Date Specifications infotype documents important dates in employment history.
- All previous dates will default and may need adjustments:
 - Anniversary Date
 - Appointment Date
 - Original Hire Date
 - Seniority Date
 - Unbroken Srv. Date
 - Prsnl Holiday Eligibility
- When finished, click  (Enter) and then click  (Save).

Infotype Edit Goto Extras System Help

Copy Date Specifications (0041)

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 04/01/2012 to 11/15/2012



Date Specifications

Date type	Date	Date type	Date
01 Anniversary Date	04/20/1995	02 Appointment Date	06/10/1998
03 Original Hire Date	04/16/1997	04 Prior PID	05/01/1999
05 Seniority Date	04/16/1997	07 Unbroken Srv. Date	04/16/1997
18 Prsnl HolidayElgblty	06/16/2006	27 TSR LV Eligibility	07/01/2011

Basic Pay (IT00008)

■ Fields to complete:

- Reason
- Next Increase (Optional)
- PS Level
- Capacity utility level
(Defaults in)

■ When finished, click  (Enter) and then click (Save). 

Infotype Edit Goto Wage types Extras System Help

Create Basic Pay (0008)

Salary amount Payments and deductions

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EESubgroup 06 Permanent

PSubarea 00MC IBEW Elec Insp M-OT Elig>40hrs/wk Status Active

Start 04/01/2012 to 12/31/9999

Subtype 0 Basic contract

Pay scale

Reason	20	Appointment Change	Cap.util.M	100.00
PS type	00	Non-Represented	WkHrs/period	87.00 Semi-monthly
PS Area	01	Standard Progression	Next inc.	
PS group	58	Level C	Ann.salary	50,304.00 USD

Wage Type Long Text	Amount	Curre	In...	A...	Number/Unit	Unit
1003 Pay Period Salary	2,096.00	USD	I	<input checked="" type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		
		USD		<input type="checkbox"/>		

IV 11/26/2012 - 11/30/2012 2,096.00 USD

Note: If the employee is eligible for a periodic increment (PID) or longevity step, and moves to a new Pay Scale Type, Pay Scale Area, Pay Scale Group or Pay Scale Level, the agency **HR Processors** must input the employee's current PID in the Next Increase field on the Basic Pay Infotype.

Personnel Administration / Payroll Handoff

- After all personnel updates are made to the employee's information, the employee information is transferred to the Payroll Processor.



HRMS Activity



Process an Appointment Change

Review Questions

- Why is the Appointment Change action similar to the Rehire action?

- True or False. When hiring an employee from another agency, the losing agency must separate the employee first.

Leave of Absences / Return from Leave

Leave of Absence / Return from Leave Overview

Upon completion of this section you will be able to:

- Describe the key terms and concepts associated with the Leave of Absence action.
- Describe the differences between a Leave of Absence – Active action and a Leave of Absence –Inactive action.

Key Terms

Absence

A time period during an employee's planned working time in which the employee does not work, including certain types of leave.

Absence Quota

The total amount of time (in hours or days) employees are allowed to use as absences. There are different Quota types for different Absence types. (i.e.. Sick leave quota, Annual leave quota)



Leave of Absence

- An ***absence*** is a time period during an employee's planned working time in which the employee does not work, including certain types of leave.
 - Absences are entered into the Cross Application Time Sheet (ESS or agency specific system) where it is transferred into HRMS and accessed to process payroll.
- Extended Leave of Absences may include:
 - Educational Leave
 - Military Leave
 - L&I

Leave of Absence – cont'd

- Employees are given **absence quotas** that are determined by their position, years of service and other factors. The absence quota varies by agency, as well as the collective bargaining unit the employee is in.
- An employee's level of seniority is dependent on the amount worked at the State of Washington, as well as the positions that have been held.

Leave of Absence – Key Points

- Use the *Monitoring of Tasks* infotype to set reminder dates for a return from leave.
- You can enter the Leave of Absence action as soon as it is known that a leave will occur. (Effective Dating)
- If the employee has accrued enough leave to cover the time period, they may receive pay and are placed on a **Paid Leave of Absence** action. If not, they are placed on an **Unpaid Leave of Absence**.

Leave of Absence

- The Leave of Absence action is divided into two main types of leave:
 - Active (Paid)
 - Inactive (Unpaid)



Leave of Absence- Inactive

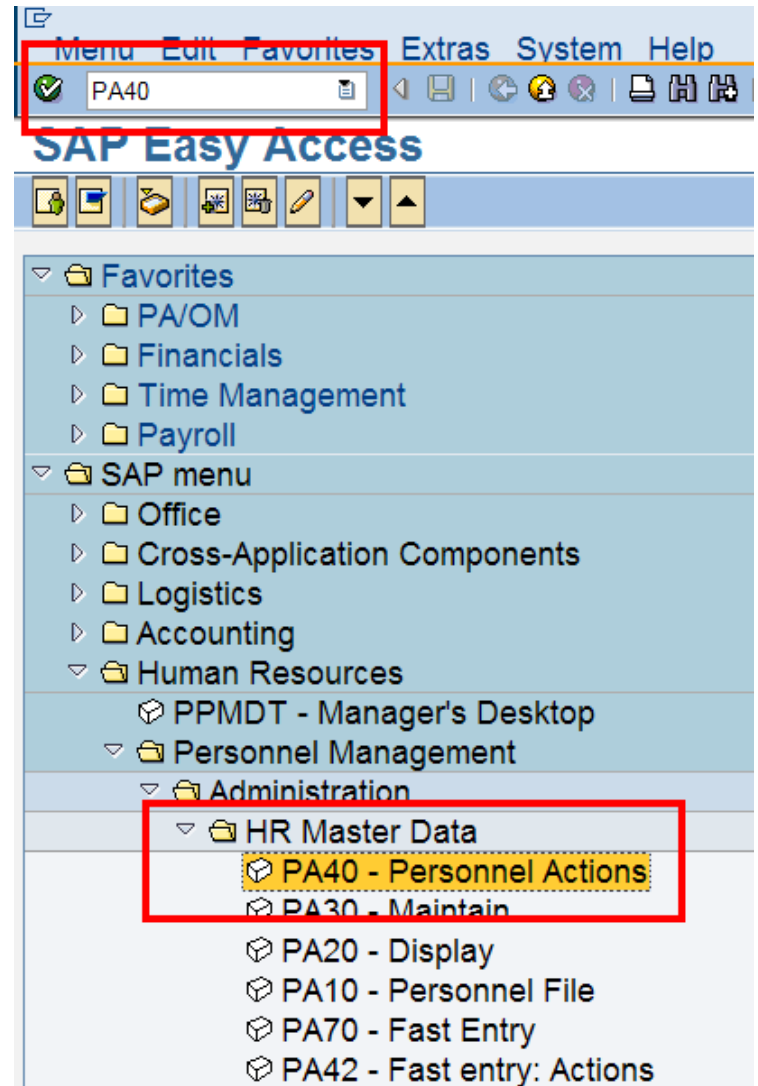
- A **Leave of Absence – Inactive** action is processed in HRMS when an employee takes leave for a significant period of time (exceeds 15 consecutive calendar days or more) and is not paid during that time.
 - For example, an employee takes three weeks leave to care for a sick family member for which they have no paid leave available.
- Many types of leave (maternity, sick) may be covered for a certain period of time.
- To process a **leave of absence- Inactive** action, follow agency business process:
 - When an employee is on a **leave of absence- Inactive** their system status becomes 'inactive'. The Time & Attendance Processor will **not** be able to enter leave in CATS.
 - An **leave of absence-Inactive** should **not** be used if the employee is submitting 8 hours of leave a month to maintain their insurance benefits.

Leave of Absence- Inactive Infotypes


- Update the following infotypes during the **Unpaid Leave of Absence** action including:
 - *Actions* (0000)
 - *Organizational Assignment* (0001)
 - *Monitoring of Tasks* (0019)

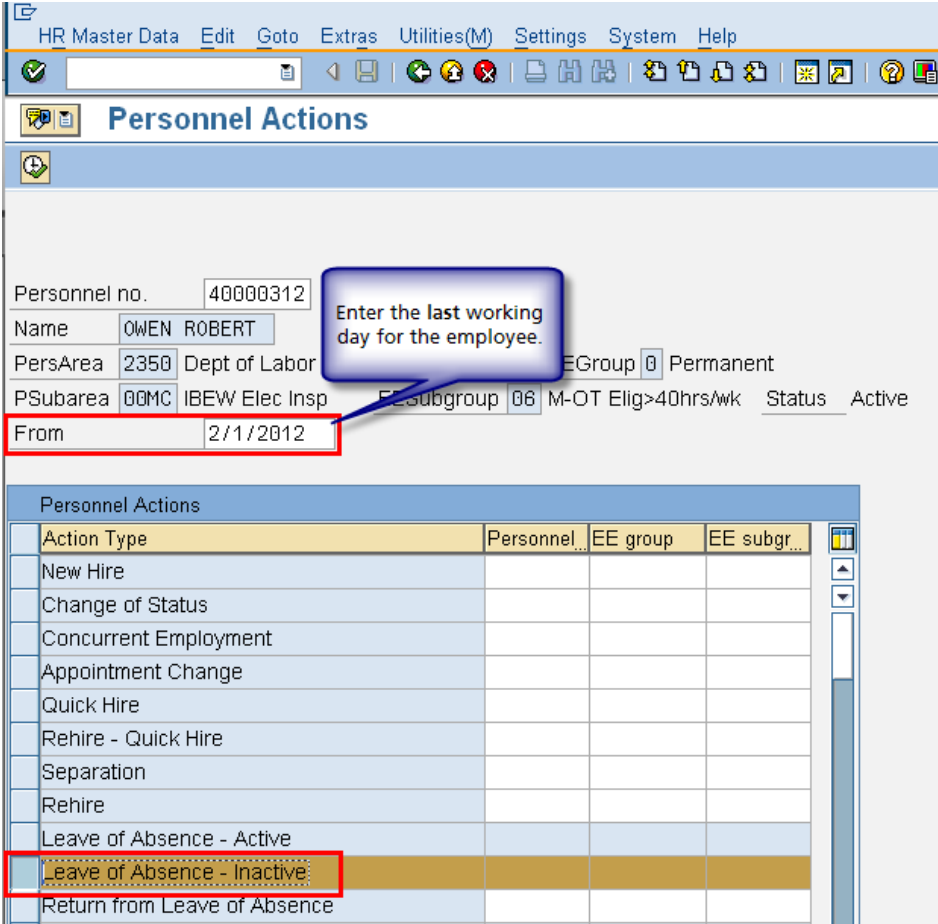
Leave of Absence- Inactive Personnel Action

- To create an Unpaid Leave of Absence Action using the menu path:
 - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
 - Or enter transaction code **PA40** in the **Command** field



Leave of Absence- Inactive

- Fields to complete:
 - **From** (Last working day of the employee.)
 - **Personnel no.**
- To access the Unpaid Leave of Absence action, click the box to the left of Leave of Absence- Inactive.
- Then click  (**Execute**).



HR Master Data Edit Goto Extras Utilities(M) Settings System Help



Personnel Actions

Personnel no. 40000312
Name OWEN ROBERT
PersArea 2350 Dept of Labor EGroup 0 Permanent
PSubarea 00MC IBEW Elec Insp EE subgroup 06 M-OT Elig>40hrs/wk Status Active
From 2/1/2012

Enter the last working day for the employee.


Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			
















Actions (0000)

- Fields to complete:
 - Reason for Action (use matchcode)
- When finished, click  (Enter) and then click  (Save).






Note: The system has added a day to the Start date. The start day becomes the first day the employee starts leave. The Employment status now reads 'Inactive' as well.

InfotypeEditGotoExtrasSystemHelp





Copy Actions (0000)

 Execute info group Change info group

Pers.No.40000015

NameNOLAN STEPHEN

PersArea3105Wash Corrections CenterEEGroup0Permanent

PSubarea00TAInstitutionsEESubgroup06M-OT Elig>40hrs/wkStatus

Start02/02/2012to12/31/9999

Personnel action

Action TypeU9 Leave of Absence - Inactive

Reason for Action02Educational

Status

Employment1 Inactive

Organizational assignment

Position70132226FISCAL TECH 2

Personnel area3105Wash Corrections Center



Employee group0Permanent

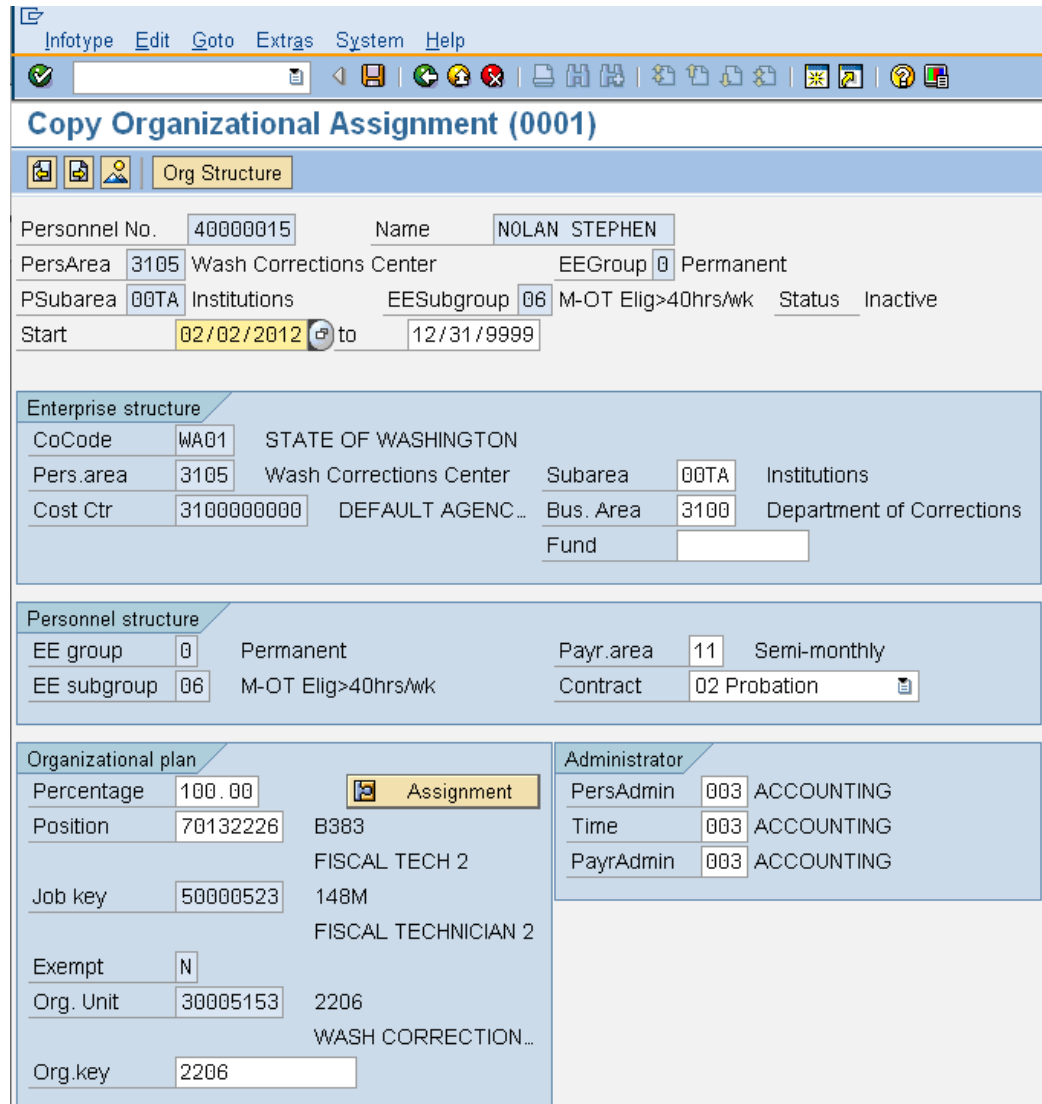
Employee subgroup06M-OT Elig>40hrs/wk

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
------------	------	-------------	------	-------------------

Organizational Assignment (0001)

- Verify the information is correct.
- When finished, click  (Enter) and then click  (Save).
 - If no changes to the infotype, continue to save.



Infotype Edit Goto Extras System Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No. 40000015 Name NOLAN STEPHEN

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Inactive

Start 02/02/2012 to 12/31/9999

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 3105 Wash Corrections Center Subarea 00TA Institutions

Cost Ctr 3100000000 DEFAULT AGENC... Bus. Area 3100 Department of Corrections

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 06 M-OT Elig>40hrs/wk Contract 02 Probation

Organizational plan

Percentage 100.00 Assignment

Position 70132226 B383

Job key 50000523 FISCAL TECH 2

Exempt N FISCAL TECHNICIAN 2

Org. Unit 30005153 2206

Org.key 2206 WASH CORRECTION...

Administrator

PersAdmin 003 ACCOUNTING



Time 003 ACCOUNTING

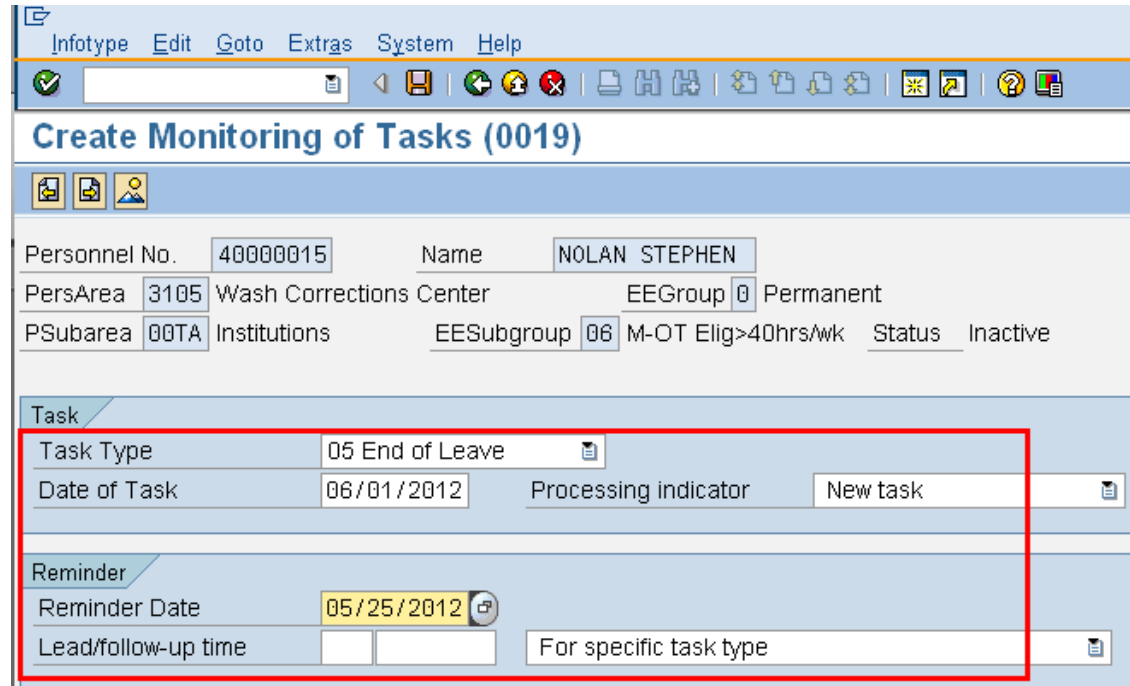
PayrAdmin 003 ACCOUNTING

Monitoring of Tasks (0019)

■ Fields to complete:

- Task Type
- Date of Task
- Processing Indicator
- Reminder Date

■ When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Create Monitoring of Tasks (0019)

Personnel No. 40000015 Name NOLAN STEPHEN

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Inactive

Task

Task Type 05 End of Leave

Date of Task 06/01/2012 Processing Indicator New task

Reminder

Reminder Date 05/25/2012

Lead/follow-up time For specific task type

Personnel Administration / Payroll

- There is no handoff to the Payroll Processor, but they should be notified that the employee has been placed on Leave of Absence.



Leave of Absence- Active

- A **leave of absence- Active** action is processed in HRMS when an employee takes leave for a significant period of time (exceeds 15 consecutive calendar days or more) and is paid (or unpaid) during that employment time.
 - The employee should be placed on **leave of absence- Active** if they are on leave without pay, but are using 8 hours of leave a month to maintain their insurance benefits.
 - The employee's status would remain 'active' while on Paid Leave of Absence.
- A **leave of absence- Active** can be granted for a number of reasons:
 - Sick Leave / Annual Leave
 - Military Leave with Pay
 - Family Medical Leave Act

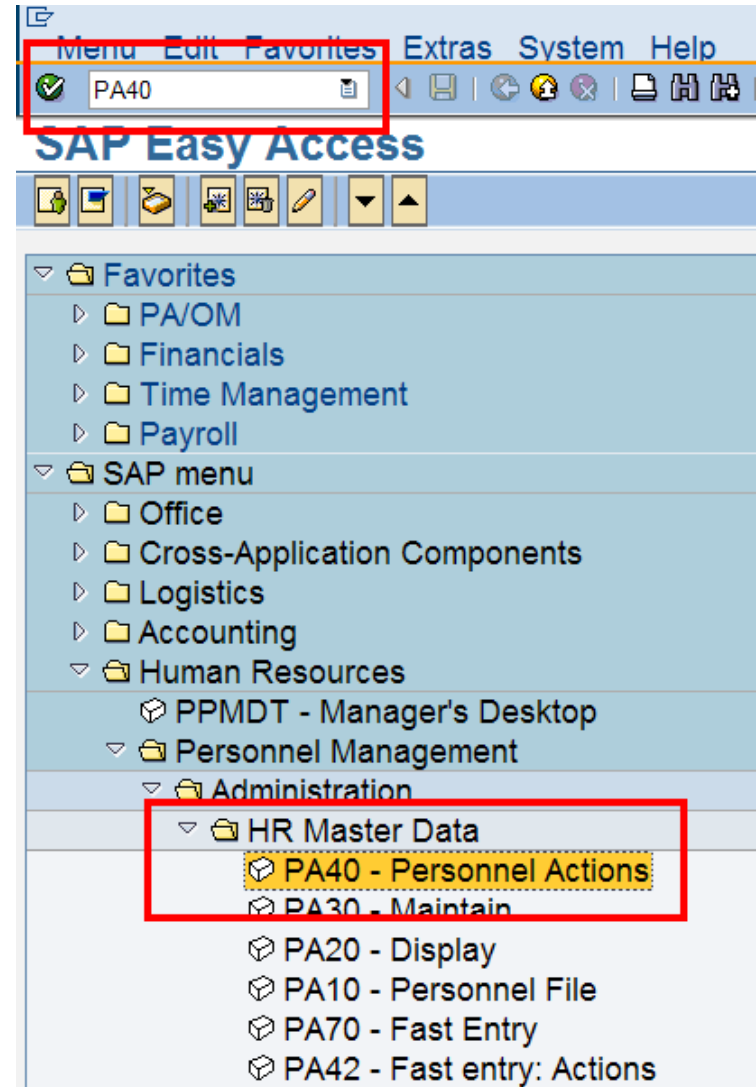
Leave of Absence- Active Infotypes

- Update the following infotypes during the Paid Leave of Absence action including:
 - *Actions (0000)*
 - *Organizational Assignment (0001)*
 - *Monitoring of Tasks (0019)*


Leave of – Active

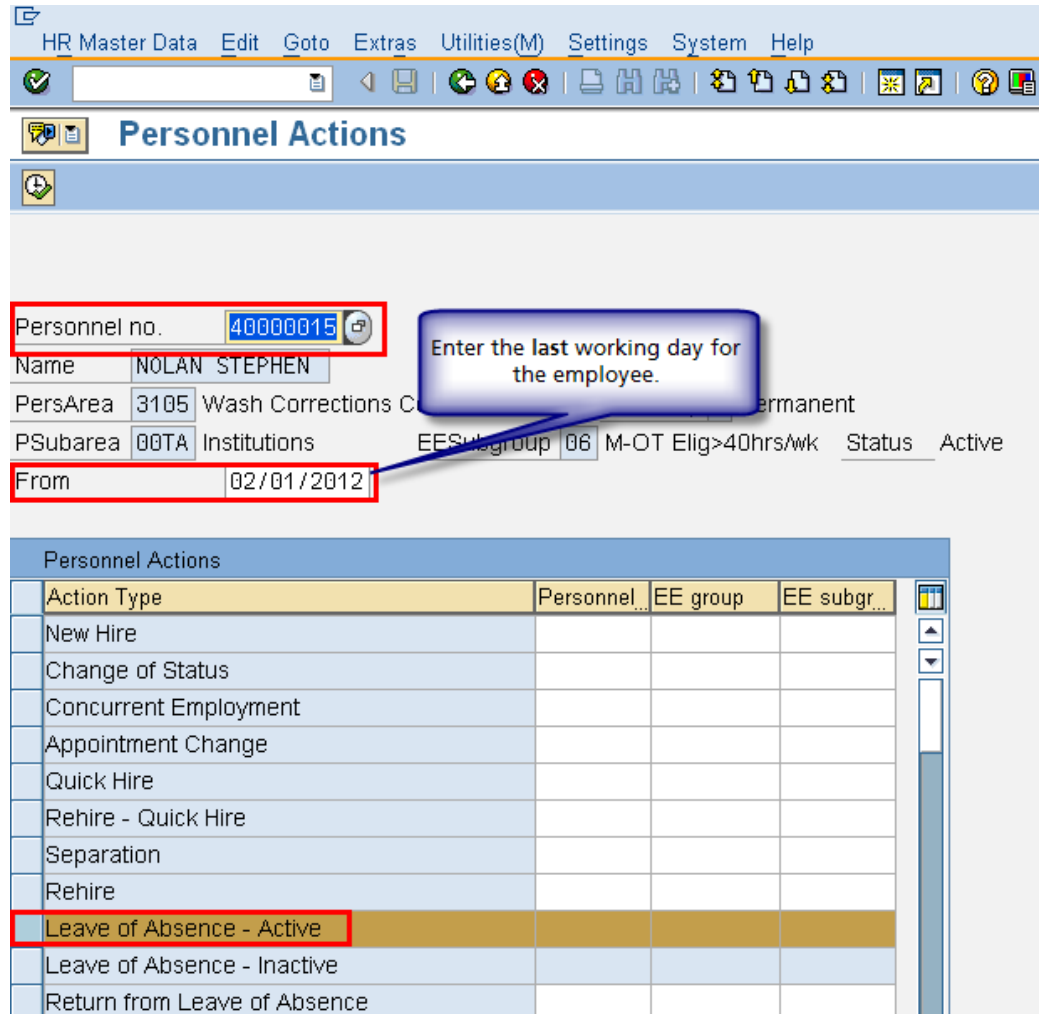
- To create an Leave of Absence Action- Active using the menu path:

- Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
- Or enter transaction code **PA40** in the **Command** field



Leave of Absence- Active

- Fields to complete:
 - **From** (*Last working day of the employee*)
 - **Personnel no.**
- To access the Leave of Absence- Active action, click the box to the left of *Leave of Absence- Active*.
- Then click  (**Execute**).



The screenshot shows the 'Personnel Actions' window. At the top is a menu bar with 'HR Master Data', 'Edit', 'Goto', 'Extras', 'Utilities(M)', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Personnel Actions' and contains a form for entering employee data. The form fields are as follows:

Personnel no.	40000015
Name	NOLAN STEPHEN
PersArea	3105 Wash Corrections C
PSubarea	00TA Institutions
EESubgroup	06 M-OT Elig>40hrs/wk
Status	Active
From	02/01/2012

A blue callout box points to the 'From' field with the text: 'Enter the last working day for the employee.'

Below the form is a table titled 'Personnel Actions' with the following columns: Action Type, Personnel, EE group, and EE subgr. The table contains the following rows:

Action Type	Personnel	EE group	EE subgr
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

The 'Leave of Absence - Active' row is highlighted with a red box.

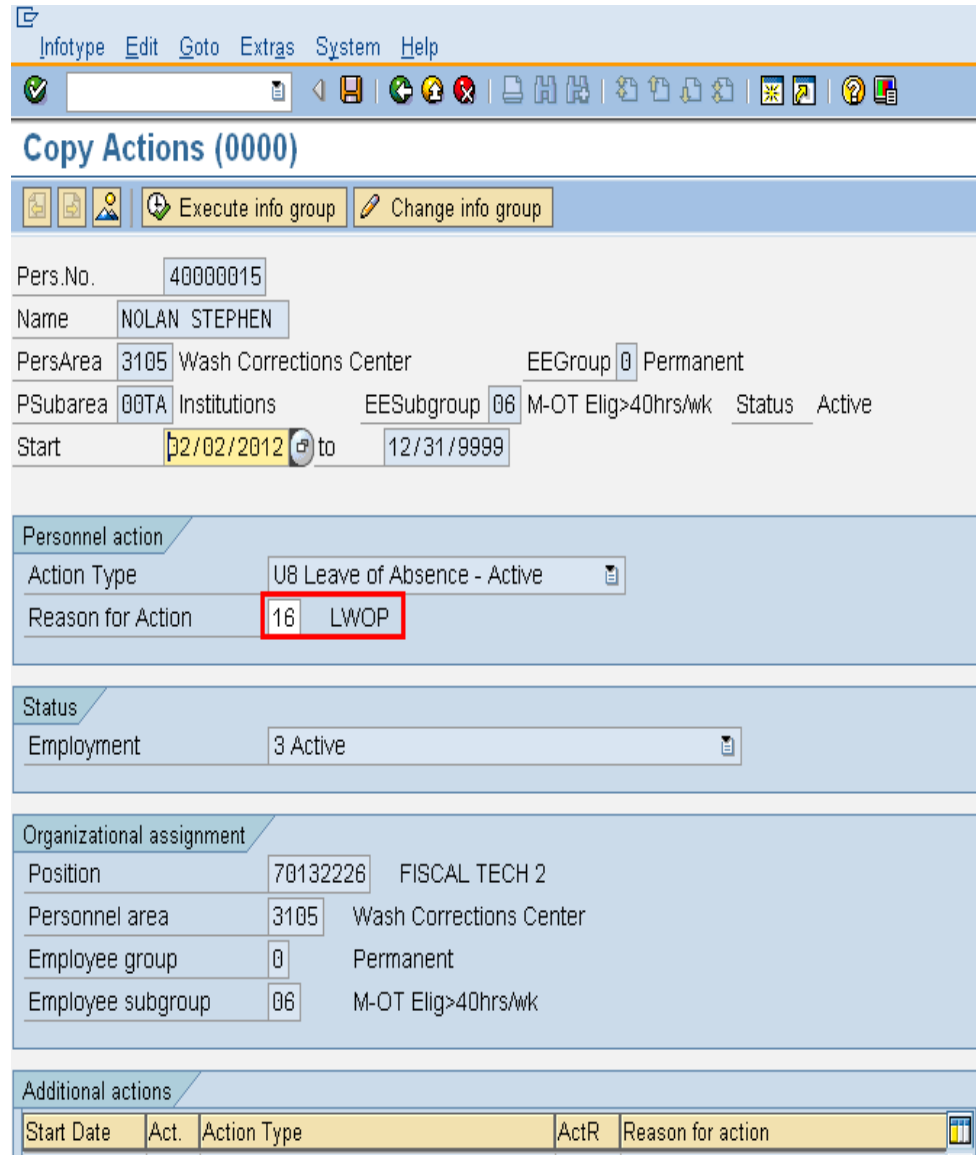
Actions (0000)

■ Fields to complete:

- **Reason for Action** (use matchcode)

- When finished, click  **(Enter)** and then click  **(Save)**.

Note: The system has added a day to the State date. The start day becomes the first day the employee starts leave.



Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000015

Name NOLAN STEPHEN

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 02/02/2012 to 12/31/9999

Personnel action

Action Type U8 Leave of Absence - Active

Reason for Action 16 LWOP

Status

Employment 3 Active

Organizational assignment

Position 70132226 FISCAL TECH 2

Personnel area 3105 Wash Corrections Center



Employee group 0 Permanent

Employee subgroup 06 M-OT Elig>40hrs/wk

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
------------	------	-------------	------	-------------------

Organizational Assignment (0001)

- Verify the information is correct.
- When finished, click  (Enter) and then click  (Save).
 - If no changes are made to the infotype, continue to save.

Infotype Edit Goto Extras System Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No. 40000015 Name NOLAN STEPHEN

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 12/02/2012 to 12/31/9999

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 3105 Wash Corrections Center Subarea 00TA Institutions

Cost Ctr 3100000000 DEFAULT AGENC... Bus. Area 3100 Department of Corrections

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 06 M-OT Elig>40hrs/wk Contract 02 Probation

Organizational plan

Percentage 100.00 Assignment

Position 70132226 B383

Job key 50000523 FISCAL TECH 2

Exempt N 148M

Org. Unit 30005153 FISCAL TECHNICIAN 2

Org.key 2206 WASH CORRECTION...

Administrator

PersAdmin 003 ACCOUNTING



Time 003 ACCOUNTING

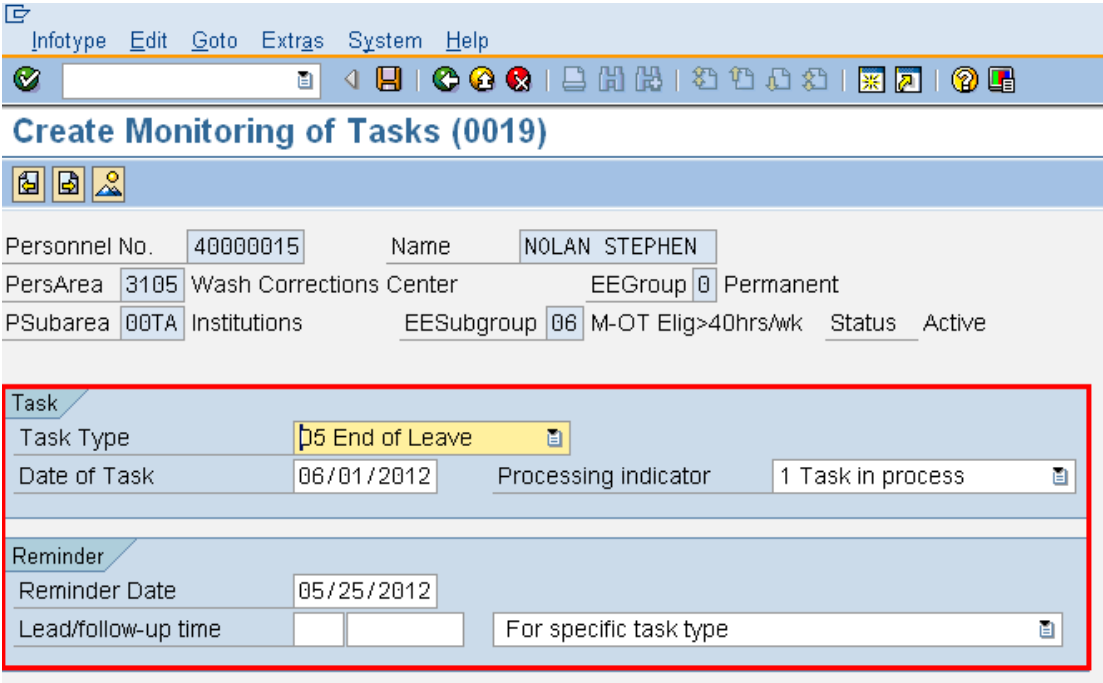
PayrAdmin 003 ACCOUNTING

Monitoring of Tasks (0019)

■ Fields to complete:

- Task Type
- Date of Task
- Processing Indicator
- Reminder Date

■ When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Create Monitoring of Tasks (0019)

Personnel No. 40000015 Name NOLAN STEPHEN

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Task

Task Type 05 End of Leave

Date of Task 06/01/2012 Processing indicator 1 Task in process

Reminder

Reminder Date 05/25/2012

Lead/follow-up time For specific task type

Personnel Administration / Payroll

- There is no handoff to the Payroll Processor, but they should be notified that the employee has been placed on Leave of Absence.



HRMS Activity



Process Paid Leave of Absence

Review Questions

- Why would you use a Leave of Absence- Active for an employee who is out on leave without pay?

- A Leave of Absence- Inactive is processed in HRMS when the employee takes how many consecutive days off?

Return from Leave of Absence

- The Return from Leave of Absence action records an employee returning from a Leave of Absence (active or inactive)
- To process the Return from Leave of Absence you must receive verification from the employee's supervisor.
 - This requirement is agency specific. Please check with your agency on the needs for the process.
- Though an end date has been set up through HRMS when leave was recorded you must complete the Return from Leave of Absence action and *Monitoring of Task* (0019).

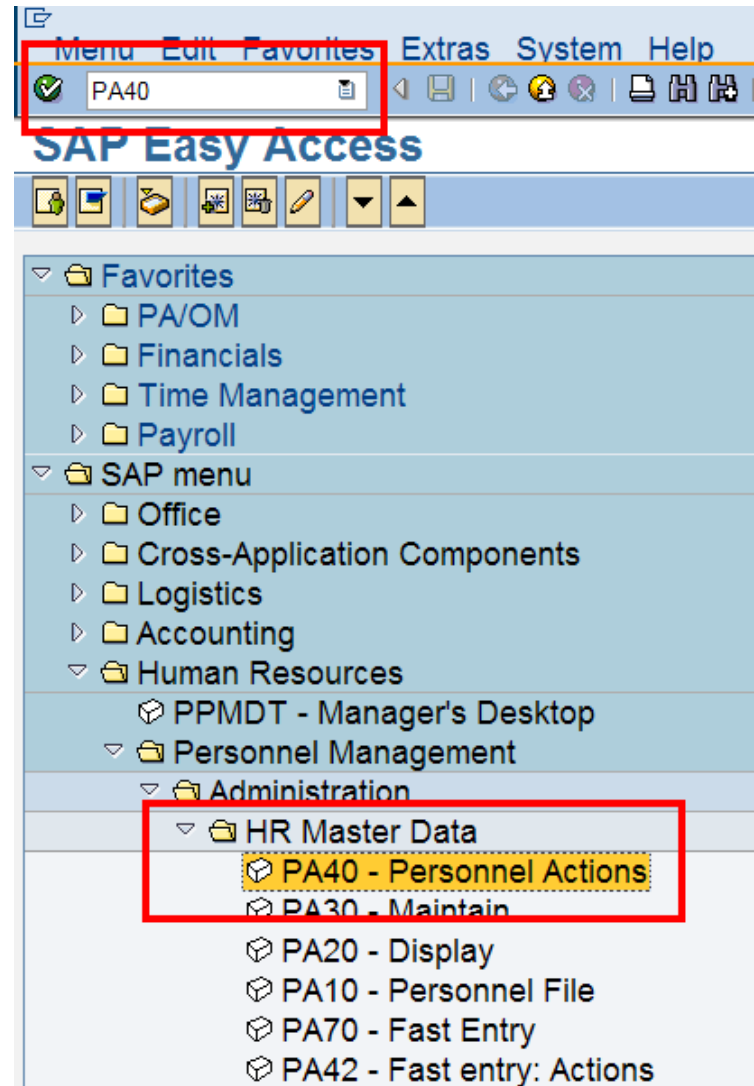


Return from Leave of Absence Infotypes


- Update the following infotypes during the Leave of Absence - Active action including:
 - *Actions* (0000)
 - *Organizational Assignment* (0001)
 - *Date Specifications* (0041)
- Use **PA30** to maintain the following infotype:
 - *Monitoring of Task* (0019)

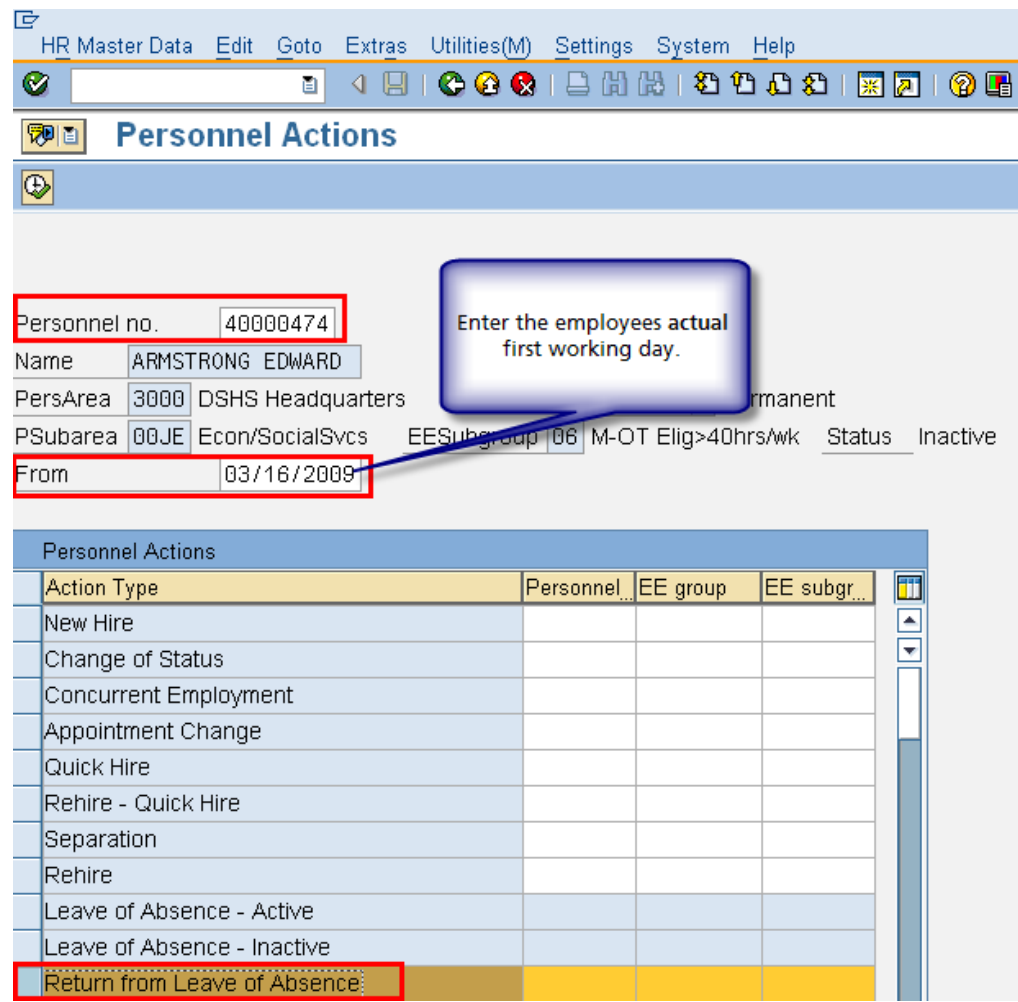
Return from Leave of Absence Personnel Action

- To create a Return from Leave of Absence Action using the menu path:
 - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
 - Or enter transaction code **PA40** in the **Command** field



Return from Leave of Absence

- Fields to complete:
 - **From** (Enter the date the employee returns from leave)
 - **Personnel no.**
- To access the Return from Leave of Absence action, click the box to the left of Return from Leave of Absence.
- Click  (**Execute**).



HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Personnel no. 40000474

Name ARMSTRONG EDWARD

PersArea 3000 DSHS Headquarters

PSubarea 00JE Econ/Social Svcs EESubgroup 06 M-OT Elig>40hrs/wk Status Inactive

From 03/16/2009

Enter the employees actual first working day.

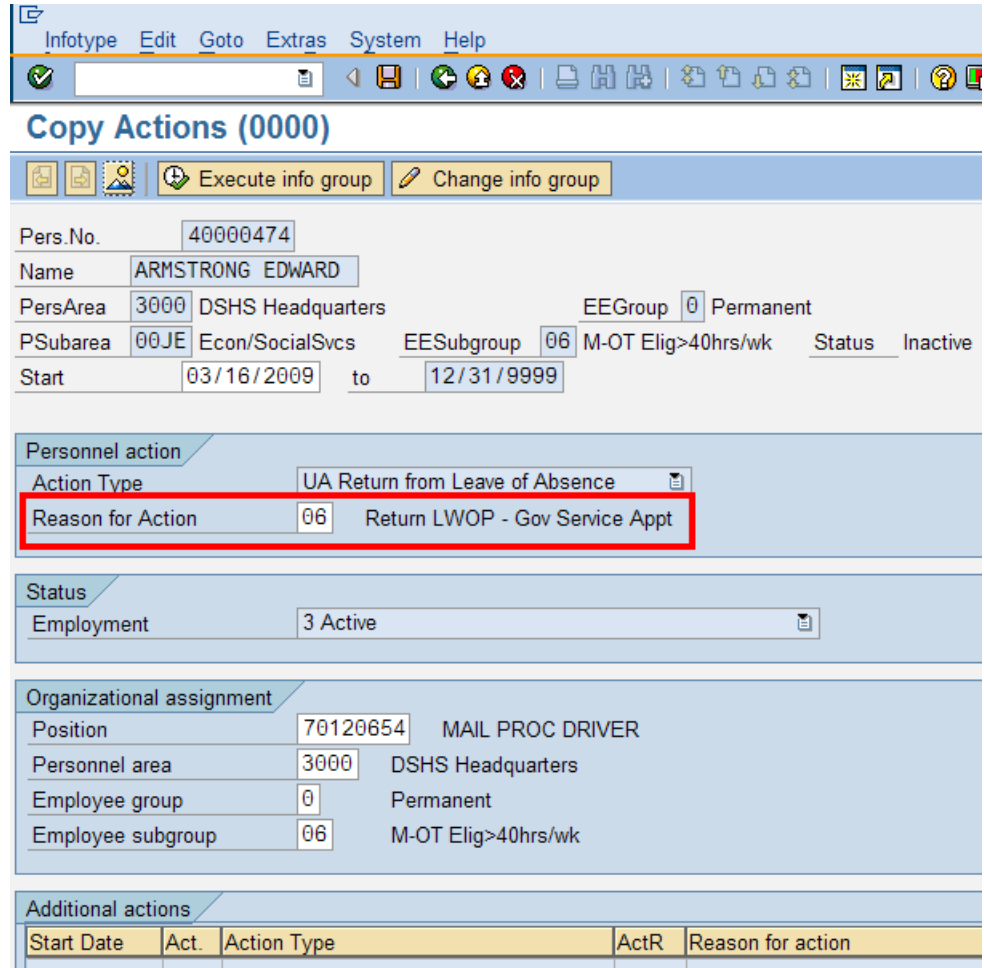
Action Type	Personnel	EE group	EE subgr
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence:			

Actions (0000)

■ Fields to complete:

- Reason for Action
(use matchcode)

■ When finished, click (Enter) and then click (Save).



Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000474
Name ARMSTRONG EDWARD
PersArea 3000 DSHS Headquarters EEGGroup 0 Permanent
PSubarea 00JE Econ/Social Svcs EESubgroup 06 M-OT Elig>40hrs/wk Status Inactive
Start 03/16/2009 to 12/31/9999

Personnel action

Action Type UA Return from Leave of Absence
Reason for Action 06 Return LWOP - Gov Service Appt

Status

Employment 3 Active



Organizational assignment

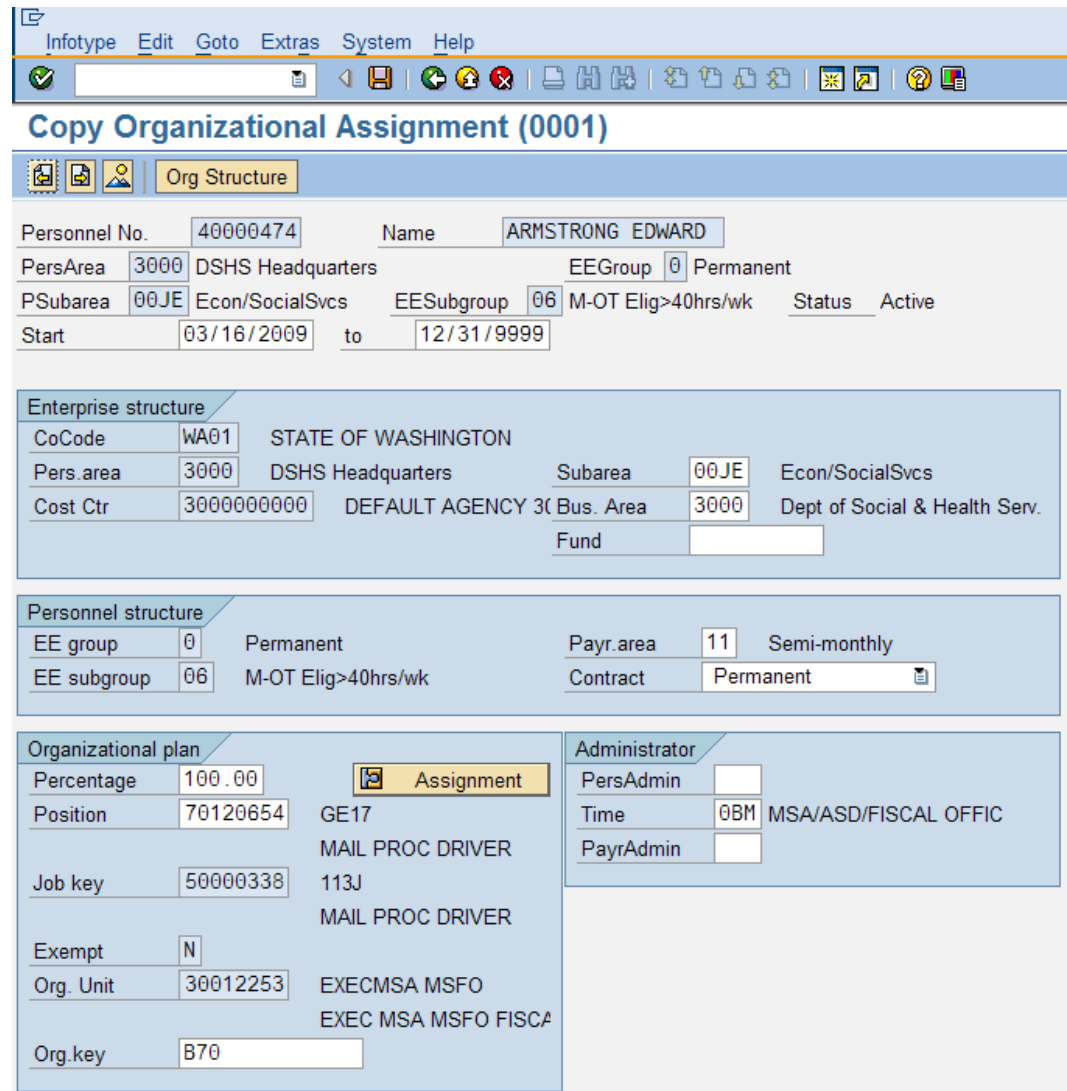
Position 70120654 MAIL PROC DRIVER
Personnel area 3000 DSHS Headquarters
Employee group 0 Permanent
Employee subgroup 06 M-OT Elig>40hrs/wk

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
------------	------	-------------	------	-------------------

Organizational Assignment (0001)

- Verify the information is correct.
- When finished, click  (Enter) and then click  (Save).
 - If no changes are made to the infotype, continue to save.



Infotype Edit Goto Extras System Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No. 40000474 Name ARMSTRONG EDWARD

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 00JE Econ/SocialSvcs EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 03/16/2009 to 12/31/9999

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 3000 DSHS Headquarters Subarea 00JE Econ/SocialSvcs

Cost Ctr 3000000000 DEFAULT AGENCY 3(Bus. Area 3000 Dept of Social & Health Serv.

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 06 M-OT Elig>40hrs/wk Contract Permanent

Organizational plan

Percentage 100.00 Assignment

Position 70120654 GE17 MAIL PROC DRIVER

Job key 50000338 113J MAIL PROC DRIVER

Exempt N

Org. Unit 30012253 EXECMSA MSFO EXEC MSA MSFO FISCA

Org.key B70

Administrator

PersAdmin

Time 08M MSA/ASD/FISCAL OFFIC

PayrAdmin

Date Specifications (0041)

- Date adjustments are not automatic in HRMS.
- When processing a return from Leave of Absence (Inactive), you may need to adjust the dates depending on the reason the employee was on Leave of Absence.
- Refer to the OLQR User Procedure, [Date Specifications - Maintain](#).



The screenshot shows the 'Copy Date Specifications (0041)' window in HRMS. The window has a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. Below the title bar, there are icons for file operations. The main area contains employee information fields:

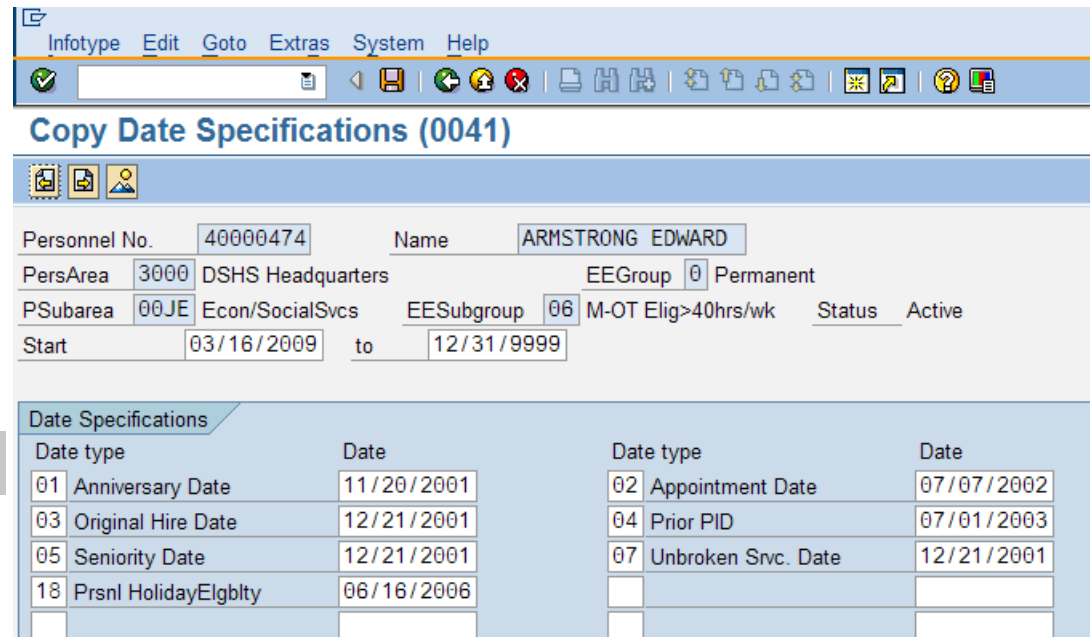
Personnel No. 40000474 Name ARMSTRONG EDWARD
PersArea 3000 DSHS Headquarters EEGroup 0 Permanent
PSubarea 00JE Econ/Social Svcs EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Start 03/16/2009 to 12/31/9999

Below the employee information is a section titled 'Date Specifications' containing a table with two columns: 'Date type' and 'Date'.

Date type	Date
01 Anniversary Date	11/20/2001
03 Original Hire Date	12/21/2001
05 Seniority Date	12/21/2001
18 Prsnl HolidayElgblty	06/16/2006
02 Appointment Date	07/07/2002
04 Prior PID	07/01/2003
07 Unbroken Svc. Date	12/21/2001

Date Specifications (0041)

- Key updates if needed or verify data.
- When finished, click  **(Enter)** and then click  **(Save)**.



Copy Date Specifications (0041)

Personnel No. 40000474 Name ARMSTRONG EDWARD

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

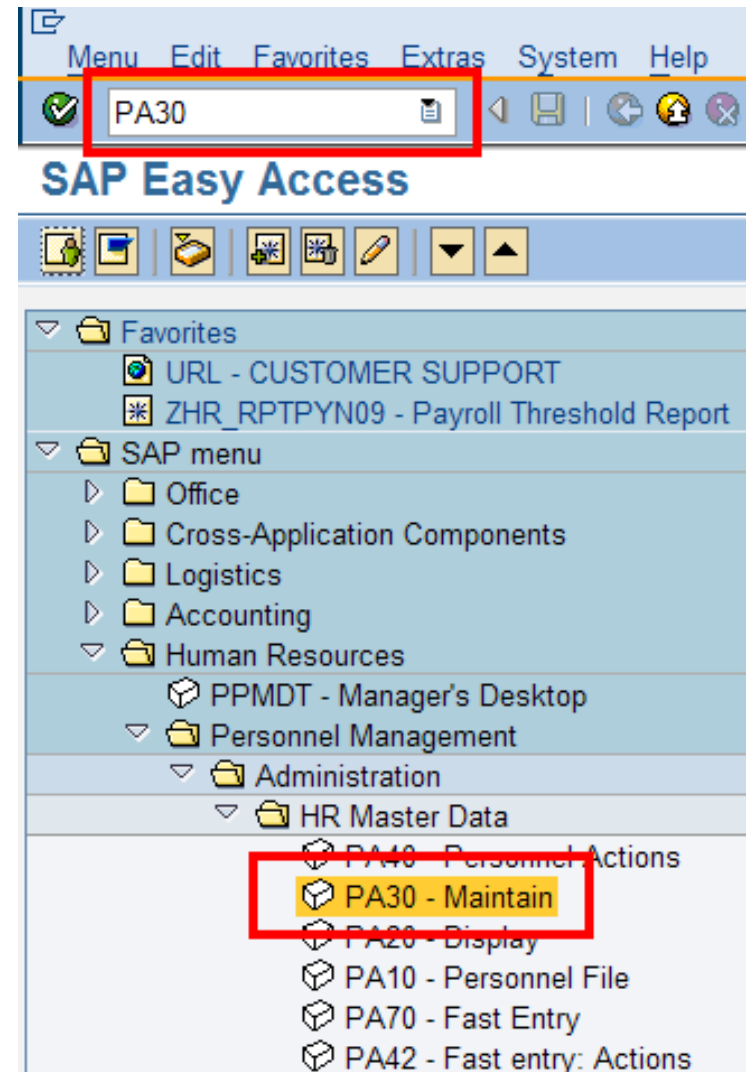
PSubarea 00JE Econ/SocialSvcs EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 03/16/2009 to 12/31/9999



Date Specifications	
Date type	Date
01 Anniversary Date	11/20/2001
03 Original Hire Date	12/21/2001
05 Seniority Date	12/21/2001
18 Prsnl HolidayElgblty	06/16/2006
02 Appointment Date	07/07/2002
04 Prior PID	07/01/2003
07 Unbroken Svc. Date	12/21/2001

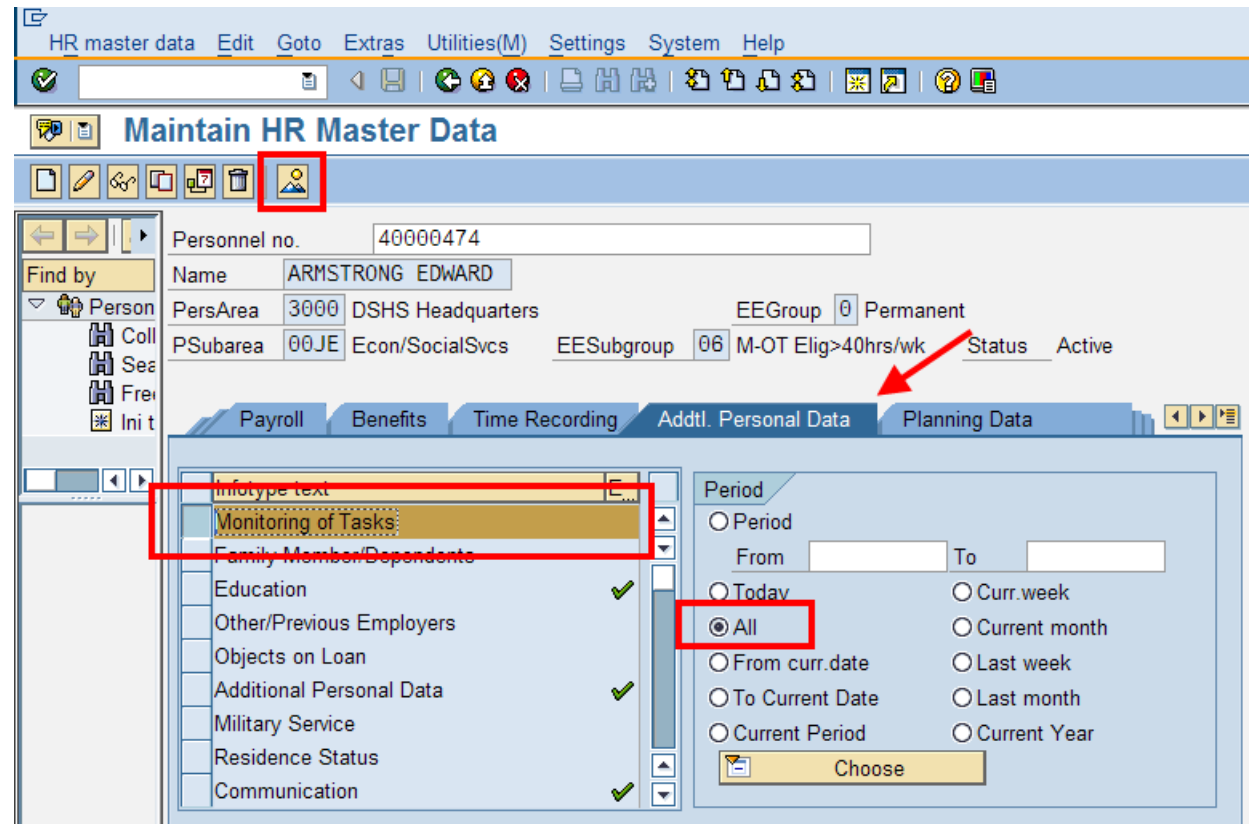
Monitoring of Task (0019)

- When the employee returns from Leave of Absence, the *Monitoring of Task* (0019) must be updated.
- To maintain the Monitoring of Task infotype:
 - Follow menu path: Human Resources → Personnel Management → Administration → HR Master Data → Maintain
 - Or enter transaction code **PA30** in the **Command** field



Maintain *Monitoring of Task* (0019)

- Click the **Addtl. Personal Data** tab and click the box to the left of the *Monitoring of Task* (0019).
- In the 'Period' section, click  (**All**).
- To view all records created, click  (**Overview**).



Monitoring of Task (0019)

Select the appropriate record

– Task Type

▪ End of Leave



Click  (Change)

Fields to complete:

– Date of Task

– Processing indicator

▪ Task Completed

When finished, click  (Enter) and then click  (Save)

Infotype Edit Goto Extras System Help

List Monitoring of Tasks (0019)

Personnel No. 40000474 Name ARMSTRONG EDWARD

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 00JE Econ/SocialSvcs EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 to 12/31/9999 STy.

Overview

Task On	Task type	Task type text	Processing indicator	Reminder
03/01/2009	05	End of Leave	New task	02/16/2009

Infotype Edit Goto Extras System Help

Copy Monitoring of Tasks (0019)

Personnel No. 40000474 Name ARMSTRONG EDWARD

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 00JE Econ/SocialSvcs EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Task

Task Type 05 End of Leave

Date of Task 03/01/2009

Processing indicator 2 Task completed

Reminder

Reminder Date 02/16/2009

HRMS Activity



Process Return from Leave of Absence

Review Questions

- From the Personnel Actions screen, what date would you enter in the 'From' field when placing someone on Active/Inactive leave of absence?

- What infotype is not included in the dynamic action Return from Leave of Absence?

Separation

Separation Overview

Upon completion of this section you will be able to:

- Define the key terms and concepts associated with the Employee Separation action.
- Navigate through the Separation infotypes and understand the importance of the information in each infotype.
- Complete an Employee Separation action.

Separation

- A **separation** occurs when an employee discontinues his/her employment with the state of Washington.

- There are three main types of separations:
 - **Retirement** - A voluntary separation from employment with the state of Washington based on years of service and eligibility.
 - **Resignation** - A voluntary separation from employment with the state of Washington.
 - **Termination** - An involuntary separation from employment with the state of Washington.

Separation

- When an employee separates from state service his/her information is stored within HRMS using the assigned personnel number.
- Reports outlining separations are sent via an interface to Health Care Authority, Department of Retirement Systems and Unions as the separation occurs.
- Prior to starting the separation action, contact the Time and Attendance Processor to delete any future CAT entries after the separation date.



- You will not be able to continue the action with these entries in CATS.
- The employee's system status will be 'withdrawn'.

Processing a Separation

- To process an employee separation, you require either:
 - A letter from the employee indicating reason for separation and the effective date.
 - A letter from the appropriate appointing authority indicating reason for separation and effective date.

Note: Your agency may have other requirements. Please follow any agency specific guidelines.

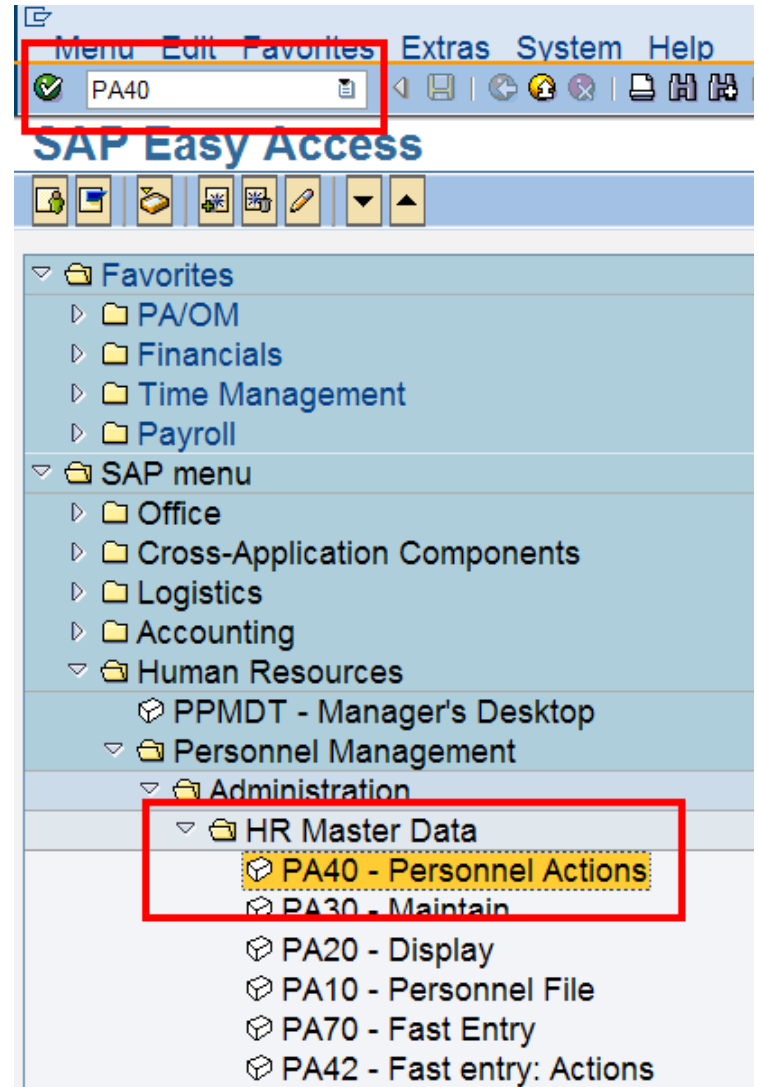


Separation Action Infotypes

- Update the following infotypes during the Separation action including:
 - *Actions* (0000)
 - Create Vacancy
 - Communications (0150)

Separation Action

- To create a Separation Action using the menu path:
 - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
 - Or enter transaction code **PA40** in the **Command** field



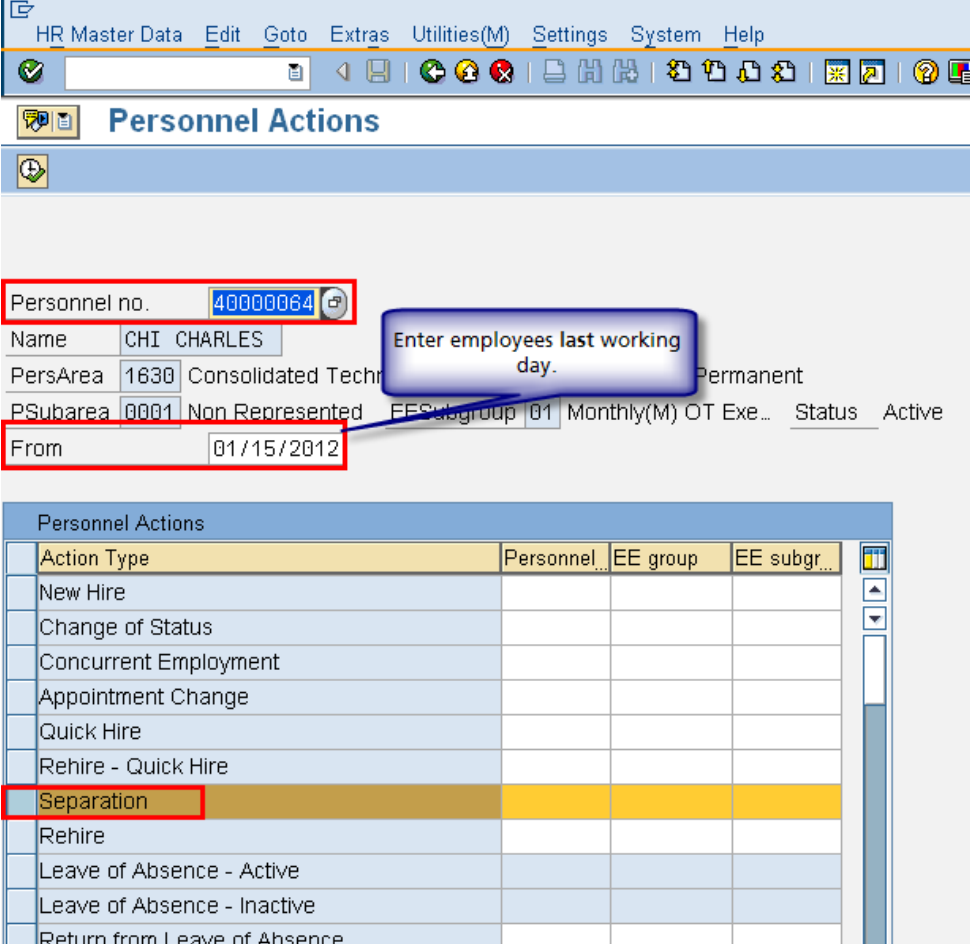
Separation Personnel Action

■ Fields to complete:

- **From** (Last working day in the office)
- **Personnel no.**


■ To access the Separation action, click the box to the left of Separation.

■ Click (**Execute**).



HR Master Data Edit Goto Extras Utilities(M) Settings System Help


Personnel Actions

Personnel no. 

Name

PersArea Consolidated Tech Permanent



PSubarea Non Represented EESubgroup Monthly(M) OT Exe... Status

From 

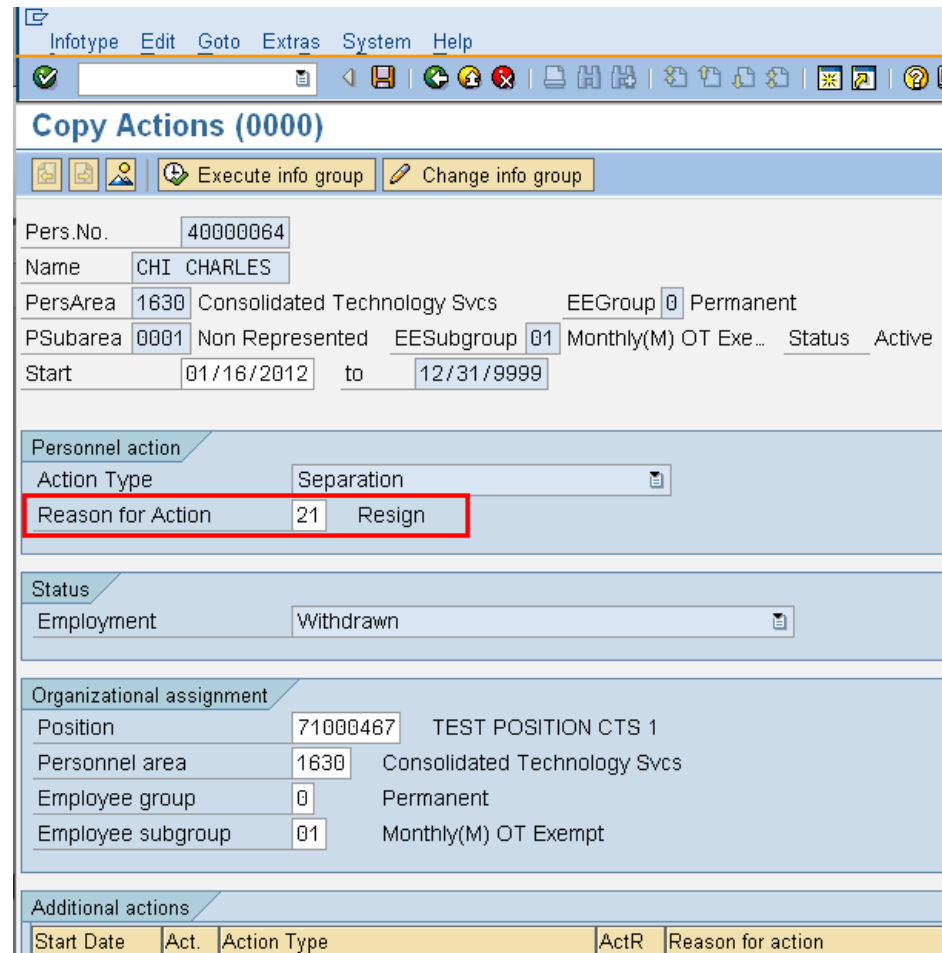
Enter employees last working day.

Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

Actions (0000)

- Fields to complete
 - Reason for Action (use drop down)
- When finished, click  (Enter) and then click  (Save).

Note: The system has added a day to the Start date. The start date is the first day the employee is separated from state service. Also the Employment status now reads 'withdrawn'.



Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000064
Name CHI CHARLES
PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active
Start 01/16/2012 to 12/31/9999

Personnel action

Action Type Separation
Reason for Action 21 Resign

Status

Employment Withdrawn

Organizational assignment

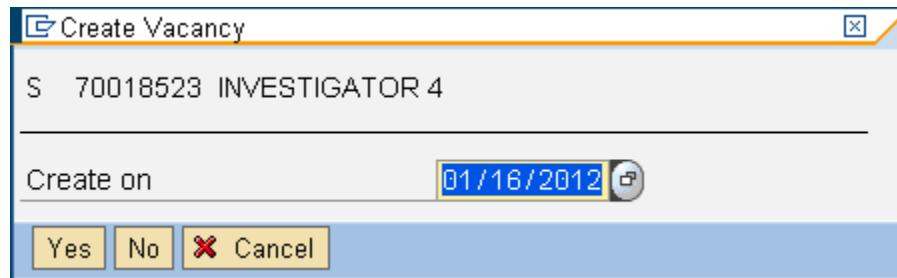
Position 71000467 TEST POSITION CTS 1
Personnel area 1630 Consolidated Technology Svcs
Employee group 0 Permanent
Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
------------	------	-------------	------	-------------------


Create Vacancy

- Upon saving the *Actions* infotype (0000), a Create Vacancy pop-up window will appear. This information is stored in the *Position Vacancy* infotype in Organizational Management.
- Click 'Yes' to Create the vacancy.
- Click 'No' if the position is multi-filled.



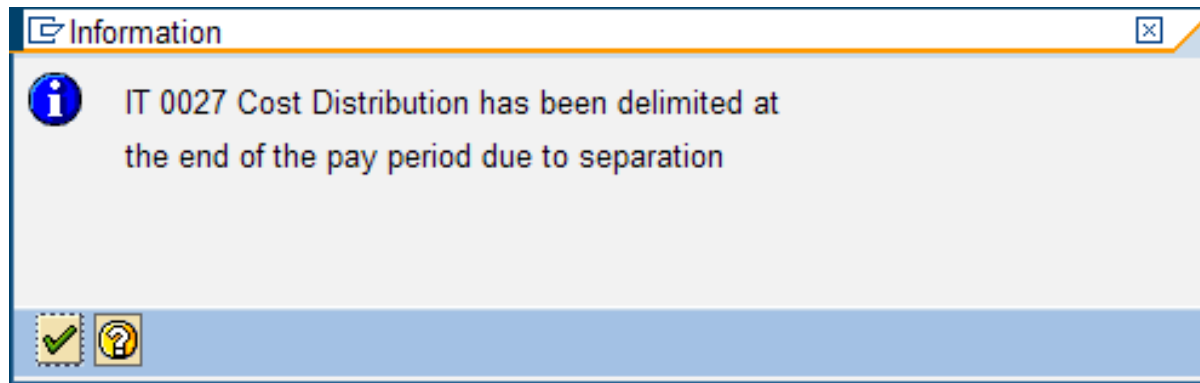
The screenshot shows a 'Create Vacancy' dialog box. The title bar reads 'Create Vacancy'. The main content area displays 'S 70018523 INVESTIGATOR 4'. Below this, there is a 'Create on' label followed by a date field containing '01/16/2012' and a calendar icon. At the bottom, there are three buttons: 'Yes', 'No', and 'Cancel' (which has a red 'X' icon).

Note: If the position is multi-filled select 'No'.

After creating the vacancy, click  (**Exit**) to exit the action.

Delimiting *Cost Distribution* (0027)

- For Employees who have an existing *Cost Distribution* (0027) established, the system will automatically delimit the infotype ending the last day of the pay period.



Note: This will not appear for every employee.

Organizational Assignment (0001)

Note: The position number located in *Organizational Assignment (0001)* will automatically change to 99999999 (system's position default) on a Separation action. **Do not** change this number back to the appointment position number. This information will be available in the infotype's history.

Infotype Edit Goto Extras System Help

Display Organizational Assignment

Org Structure

Find by

- Person
- Collective search h
- Search Term
- Free search
- Ini test

Personnel No. 40000064 Name CHI CHARLES

PersArea 1550 Dept of Info Services EESubgroup 01 P

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT

Start 01/16/2010 to 12/31/9999 Chng 01/25

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 1550 Dept of Info Services Subarea 0

Cost Ctr 1550000000 DEFAULT AGENCY 1 Bus. Area 1

Fund

Personnel structure

EE group 0 Permanent Payr.area

EE subgroup 01 Monthly(M) OT Exempt Contract

Organizational plan

Position 99999999 Integration: default posi

Job key 50001666 IT SPEC 4

Exempt N

Org. Unit 30000877 Command Center (Grave)

Org.key 4640


Administrator

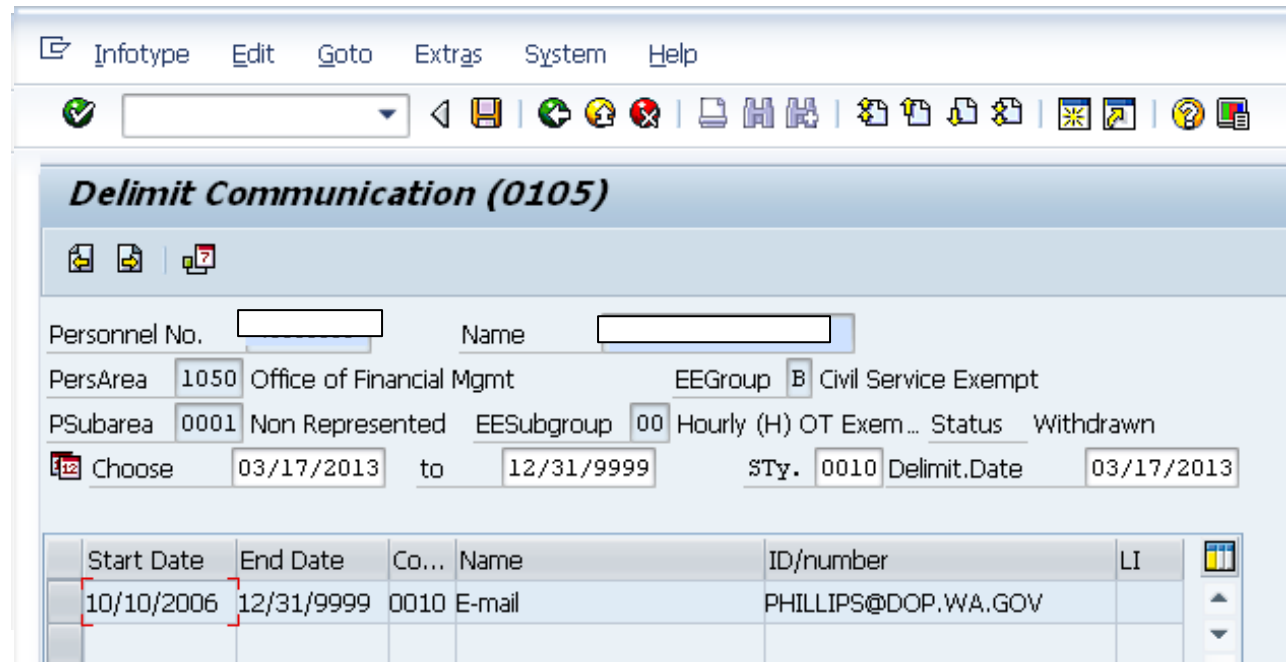
PersAdmin

Time

PayrAdmin


Communications (0105)

- The **delimit** communications infotype is used to delimit the email address to be used.
- Select the box to left of the email address to select.
- Press  (Delimit).



The screenshot shows the SAP 'Delimit Communication (0105)' form. The menu bar includes Infotype, Edit, Goto, Extras, System, and Help. The title bar is 'Delimit Communication (0105)'. Below the title bar are icons for saving, deleting, and other actions. The form contains several input fields: Personnel No., Name, PersArea (1050 Office of Financial Mgmt), EEGroup (B Civil Service Exempt), PSubarea (0001 Non Represented), EESubgroup (00 Hourly (H) OT Exem...), Status (Withdrawn), Choose (03/17/2013 to 12/31/9999), STy. (0010), and Delimit.Date (03/17/2013). At the bottom is a table with columns: Start Date, End Date, Co..., Name, ID/number, and LI. The first row of the table has the following values: 10/10/2006, 12/31/9999, 0010, E-mail, PHILLIPS@DOP.WA.GOV, and LI. The 'LI' column has a small icon next to it.

Start Date	End Date	Co...	Name	ID/number	LI
10/10/2006	12/31/9999	0010	E-mail	PHILLIPS@DOP.WA.GOV	LI

After saving, click  (**Exit**) to exit the action.

Personnel Administration / Payroll Handoff

- After personnel updates are made to the employee's information, the employee information is transferred to the Payroll Processor.
- After the separation, the employee's personnel number remains exclusive to their file.

For example: If John retires in 2009 and decides to return to employment in 2015, his personnel number from his last employment is still valid and will identify his record in 2015. When John returns back to state employment, he will be considered a *Rehire*.






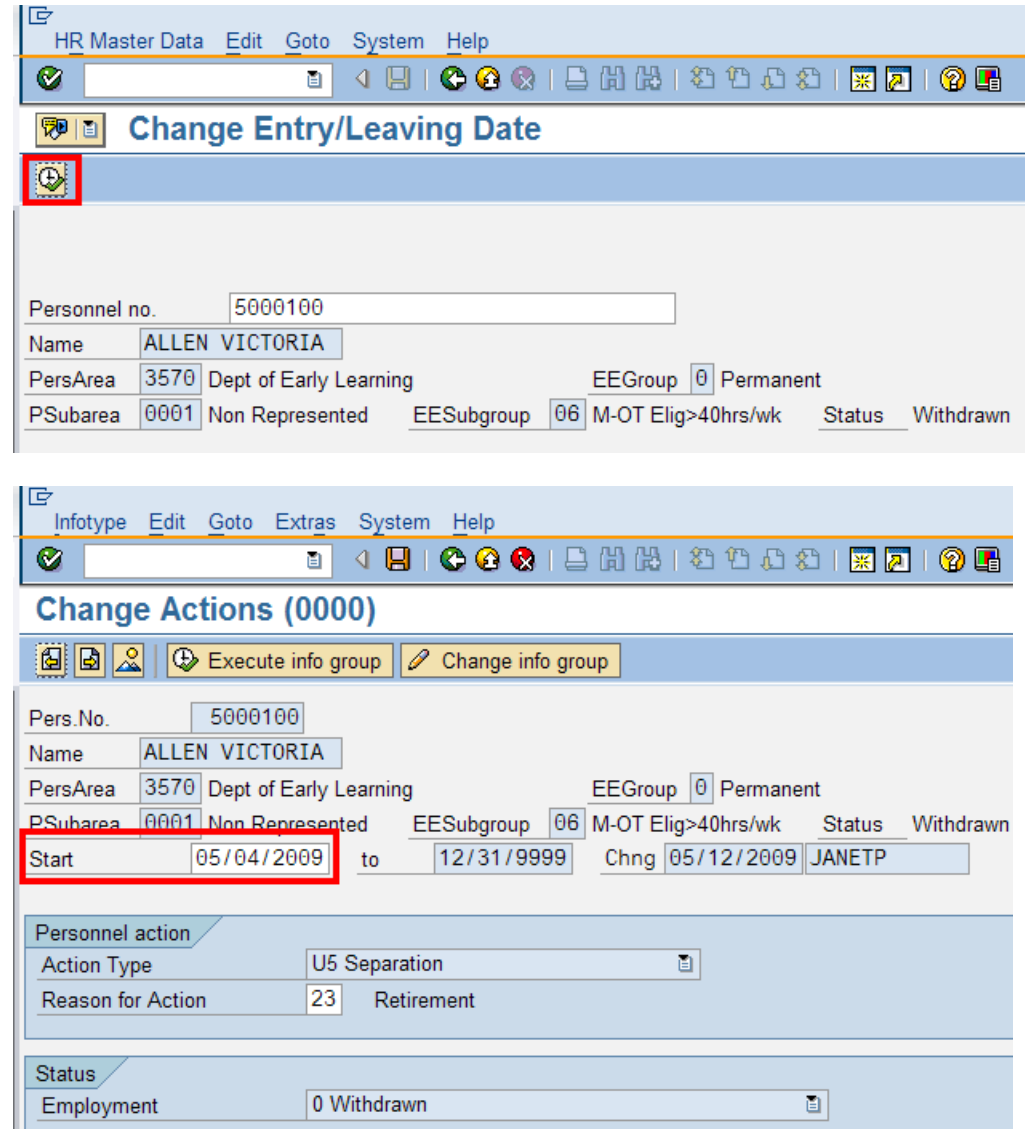
HRMS Activity



Process Employee Separation

Change Leaving Date – Separation

- To change the employee's leaving date after the separation action has been completed, use the Change Entry/Leaving Date transaction **PA41**.
- Click  (**Execute**).
- Enter new date in **Start** field, click  (**Enter**) and then click  (**Save**).



HR Master Data Edit Goto System Help

Change Entry/Leaving Date

Personnel no. 5000100

Name ALLEN VICTORIA

PersArea 3570 Dept of Early Learning EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Withdrawn

Infotype Edit Goto Extras System Help

Change Actions (0000)

Execute info group Change info group

Pers.No. 5000100

Name ALLEN VICTORIA

PersArea 3570 Dept of Early Learning EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Withdrawn

Start 05/04/2009 to 12/31/9999 Chng 05/12/2009 JANETP

Personnel action




Action Type U5 Separation

Reason for Action 23 Retirement

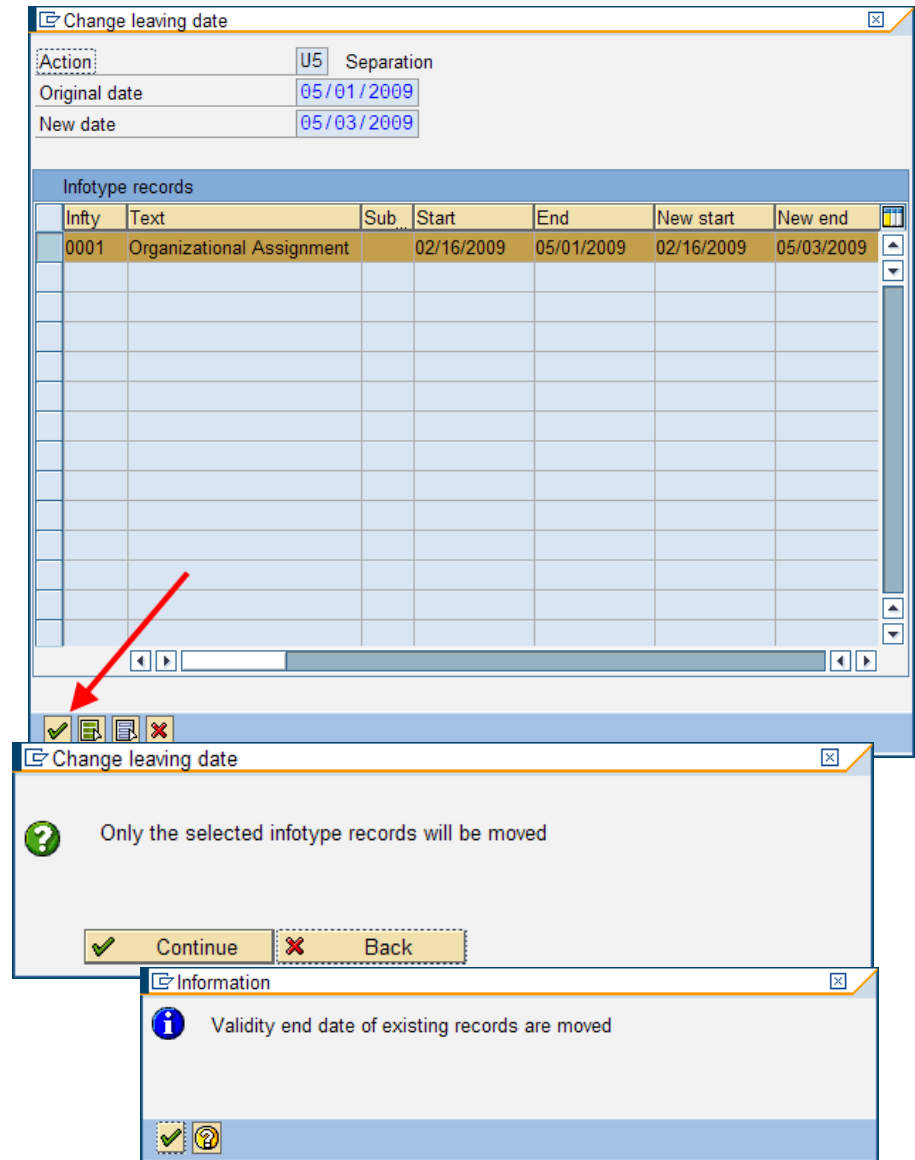
Status

Employment 0 Withdrawn

Change Leaving Date – Separation

- Select all infotypes that will need to be changed.
- Click  **(Continue (Enter))**.
- Postpone action dialog will appear, click  **Continue (Continue)**.
- Information dialog will appear, click  **(Continue)**.

See OLQR User Procedure, [Separation Action – Change Leaving Date](#) for more information.



The screenshot shows the 'Change leaving date' dialog box. The 'Action' is 'U5 Separation'. The 'Original date' is '05/01/2009' and the 'New date' is '05/03/2009'. Below this is a table of 'Infotype records'.

Infity	Text	Sub	Start	End	New start	New end
0001	Organizational Assignment		02/16/2009	05/01/2009	02/16/2009	05/03/2009

A red arrow points to the 'Continue' button (with a green checkmark icon) in the bottom left of the dialog. Below the main dialog, two smaller information dialogs are shown. The first one says 'Only the selected infotype records will be moved' and has 'Continue' and 'Back' buttons. The second one says 'Validity end date of existing records are moved' and has a 'Continue' button.

Personnel Administration Reports

Personnel Administration Reports

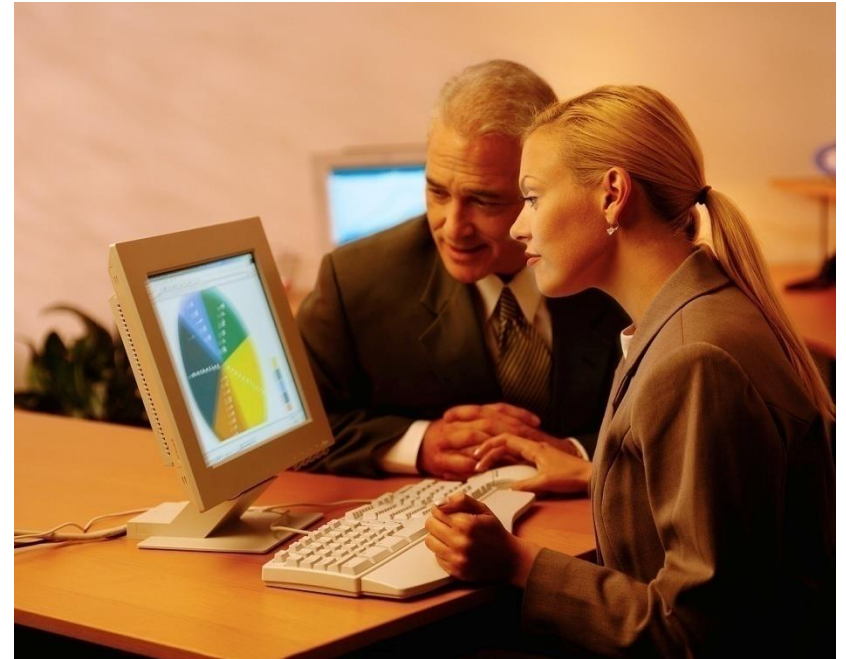
Upon completion of this section you will be able to:

Learn the basic components of running reports needed to complete Personnel Administration tasks.

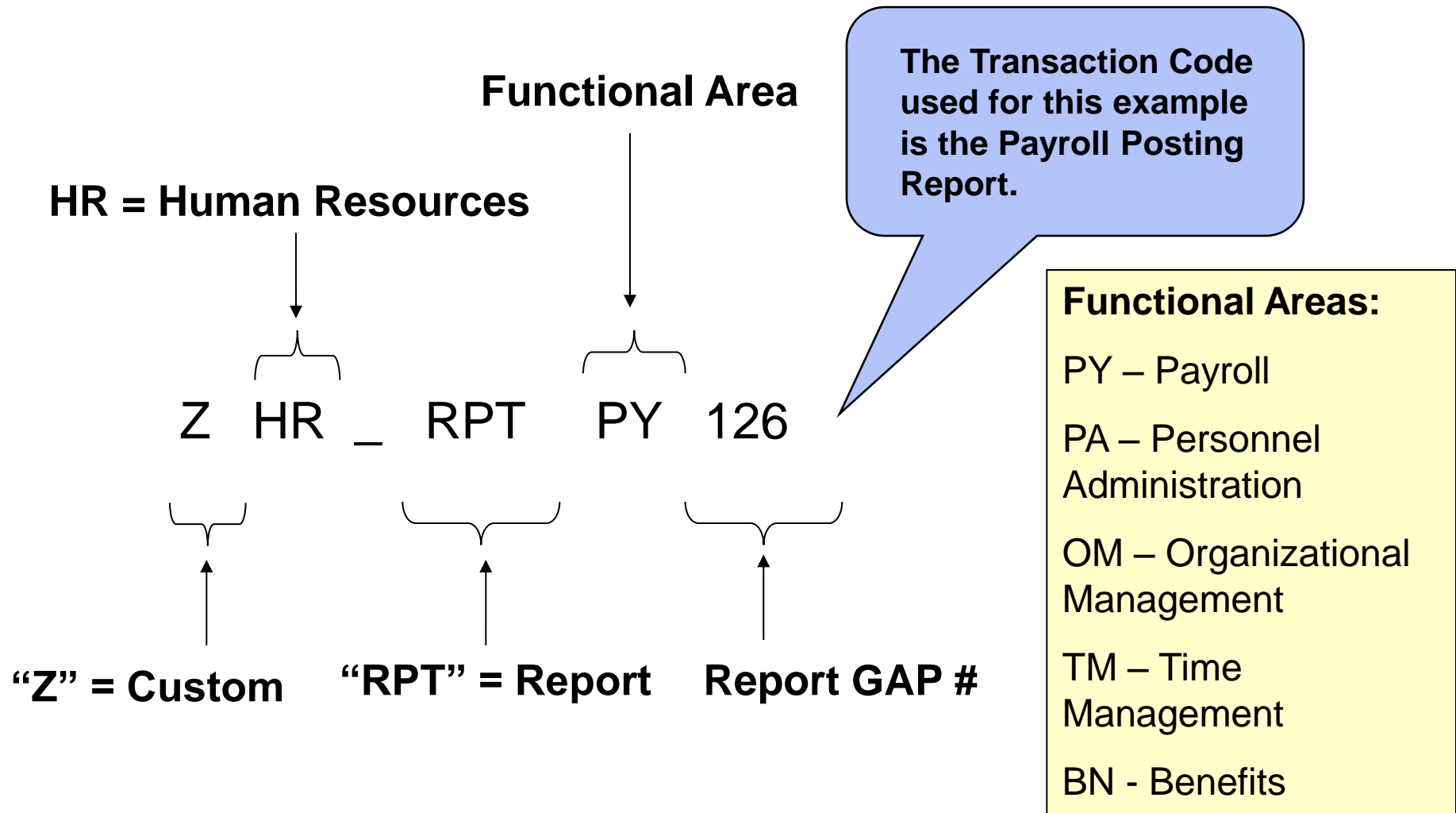


Reporting in HRMS

- HRMS integration provides the capability to run reports within Personnel Areas (agencies or sub-agencies).
- Generating reports allows you to process information quickly to support decision making.
- Ability to export and manipulate “real-time” data.



HRMS Customized Reporting - Transaction Code Map



HRMS Reporting resources

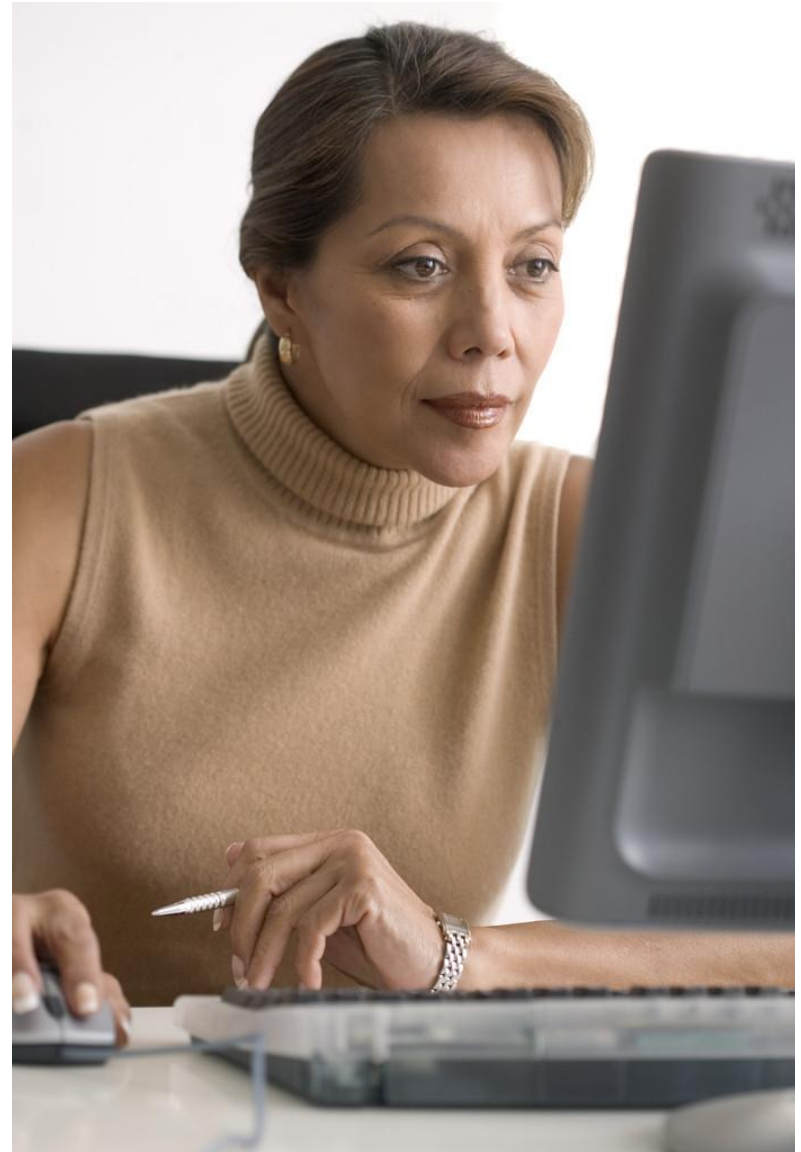
Visit the OLQR website
(<http://www.hr.wa.gov/payroll/HRMS/OnlineQuickReference/>) for the following:

- HRMS Reports
 - [Variants Create and Retrieve](#)
- Job Aids A-Z




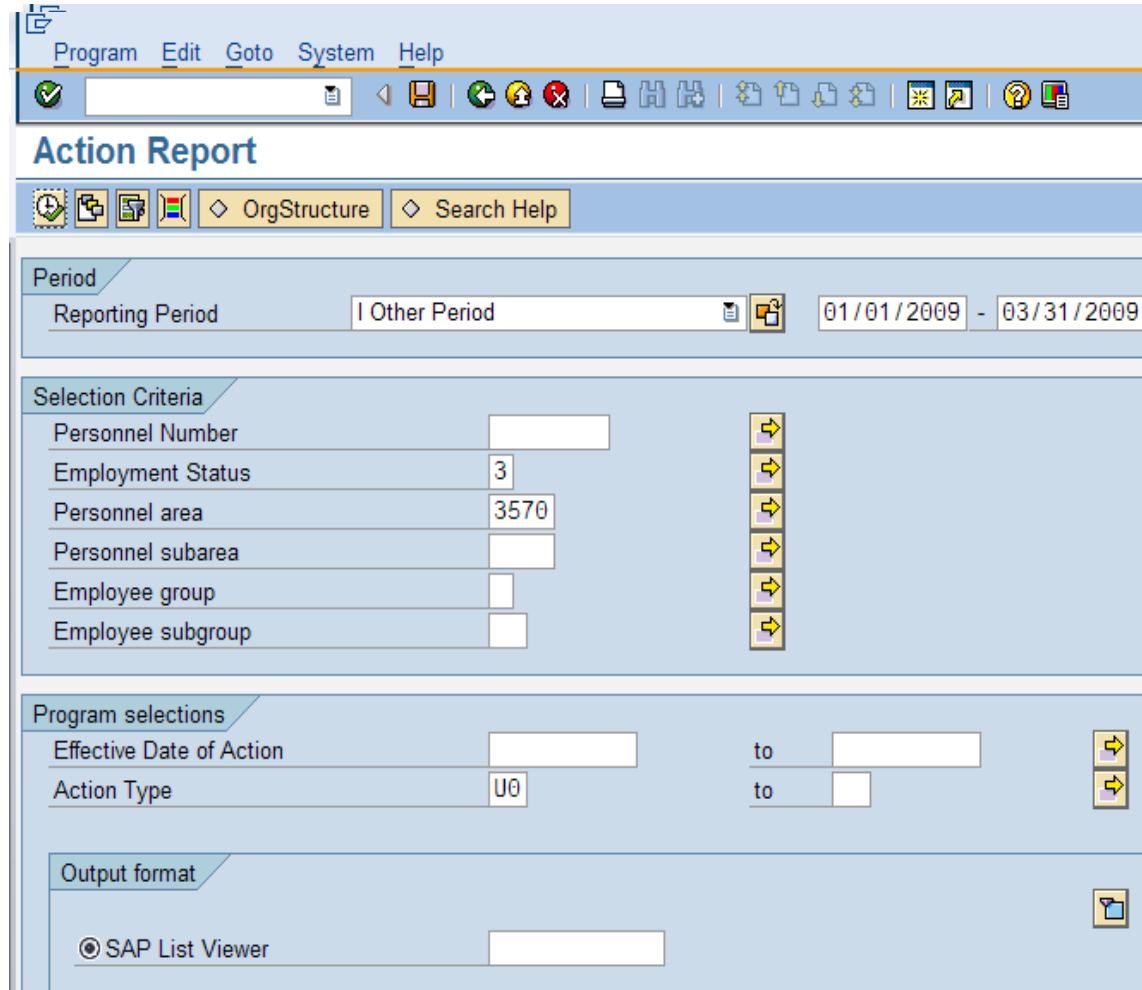
Actions Report

- Used to identify new hires, transfers and/or separations within the organization.
- Run the report when analysis on new hires is needed.
- Access the report using the transaction code **ZHR_RPTPA457**.



Actions Report

- Select a Reporting Period as required
- Selection Criteria include the following conditional fields:
 - Personnel Number
 - Employment Status
 - Personnel area
- Enter the conditional Program selections
 - Effective Date of Action
 - Action Type
- Click  (Execute)



The screenshot displays the SAP 'Action Report' interface. At the top is a menu bar with 'Program', 'Edit', 'Goto', 'System', and 'Help'. Below it is a toolbar with various icons. The main title 'Action Report' is centered. A sub-toolbar contains 'OrgStructure' and 'Search Help' buttons. The 'Period' section includes a 'Reporting Period' dropdown set to 'I Other Period' and a date range '01/01/2009 - 03/31/2009'. The 'Selection Criteria' section lists fields: 'Personnel Number' (empty), 'Employment Status' (3), 'Personnel area' (3570), 'Personnel subarea' (empty), 'Employee group' (empty), and 'Employee subgroup' (empty). To the right of these fields are six arrow icons. The 'Program selections' section has 'Effective Date of Action' (empty) and 'Action Type' (U0), with 'to' fields and arrow icons. The 'Output format' section shows 'SAP List Viewer' selected with a corresponding icon.

Viewing Results: Actions Report

Action Report							
Personnel Area	Personnel Subarea	Duty Station Cou...	Position	Job	Last name First name	Effective D...	End Date
Dept of Early Learning	Non Represented	34	71000051	FISCAL ANALYST 2	ALLEN, VICTORIA	03/01/2009	05/03/2009
	Non Represented	34	71000052	FISCAL ANALYST 3	HOLDEN, PAIGE	02/16/2009	12/31/9999
	Non Represented	34	71000053	FISCAL ANALYST 2	WOODWARD, LEO	02/16/2009	12/31/9999
	Non Represented	34	71000055	FISCAL ANALYST 2	FROST, ELLIS	02/16/2009	12/31/9999
	Non Represented	34	71000058	FISCAL ANALYST 3	JOHN, LILLY	02/16/2009	12/31/9999
	Non Represented	34	71000061	FISCAL ANALYST 2	WONG, AIDAN	02/16/2009	12/31/9999
	Non Represented	34	71000063	FISCAL ANALYST 3	SINGE, ERIN	02/16/2009	12/31/9999
	Non Represented	34	71000064	FISCAL ANALYST 2	COLEMAN, AALIYAH	02/16/2009	12/31/9999
	Non Represented	34	71000065	FISCAL ANALYST 3	WALKER, SPENCER	02/16/2009	12/31/9999
	Non-supervisory	34	71004271	SOCIAL WORKER 3	AIZAWA, YUICHI	05/07/2007	12/31/9999
	Non-supervisory	34	71004235	SOCIAL WORKER 3	WOODLEY, SHAILENE	07/09/2007	12/31/9999
	Non-supervisory	34	71004372	SOCIAL & HEALTH PROGRAM CONSULTANT 2	RAISA, FRANCA	01/16/2008	12/31/9999
	Non-supervisory	34	71004171	SOCIAL & HEALTH PROGRAM CONSULTANT 2	BELLE, CAMILLE	05/27/2008	12/31/9999
	Non Represented	34	71000056	FISCAL ANALYST 3	BROWN, DAISY	02/16/2009	12/31/9999
	Non Represented	34	71000060	FISCAL ANALYST 3	SMITH, DEMI	02/16/2009	12/31/9999
	Non-supervisory	34	71004362	SECRETARY SENIOR	RIDER, AMY	10/22/2007	12/31/9999
	Non Represented	34	71000057	FISCAL ANALYST 2	CHAMBERS, THOMAS	02/16/2009	12/31/9999
	Non Represented	34	71000054	FISCAL ANALYST 3	HUDSON, LOUIS	02/16/2009	12/31/9999
	Non Represented	34	71000059	FISCAL ANALYST 3	CONOLLY, KAI	02/16/2009	12/31/9999
	Non Represented	34	71000062	FISCAL ANALYST 2	DAVIDSON, FAITH	02/16/2009	12/31/9999
	Non Represented	34	71000066	FISCAL ANALYST 4	FLORENTINO, SIMONETTA	02/16/2009	12/31/9999

Viewing Results: Actions Report – cont'd

Action Report					
Act.	Reason for Action	Org. un.	EO	Personnel ID	Name of Action Type
U0	Probationary Appointment	31000051	01	05000100	New Hire
U0	Probationary Appointment	31000051		05000101	New Hire
U0	Probationary Appointment	31000051		05000102	New Hire
U0	Probationary Appointment	31000051		05000104	New Hire
U0	Probationary Appointment	31000051		05000107	New Hire
U0	Probationary Appointment	31000051		05000110	New Hire
U0	Probationary Appointment	31000051		05000112	New Hire
U0	Probationary Appointment	31000051		05000113	New Hire
U0	Probationary Appointment	31000051		05000114	New Hire
U0	Probationary Appointment	31003180		40000426	New Hire
U0	Probationary Appointment	31003181		40000428	New Hire
U0	Probationary Appointment	31003180		40000430	New Hire
U0	Probationary Appointment	31003181		40000431	New Hire
U0	Probationary Appointment	31000051	02	05000105	New Hire
U0	Probationary Appointment	31000051		05000109	New Hire
U0	Probationary Appointment	31003179		40000429	New Hire
U0	Probationary Appointment	31000051	03	05000106	New Hire
U0	Probationary Appointment	31000051	04	05000103	New Hire
U0	Probationary Appointment	31000051		05000108	New Hire
U0	Probationary Appointment	31000051		05000111	New Hire
U0	Probationary Appointment	31000051	05	05000115	New Hire

HRMS Activity



**Action Report –
ZHR_RPTPA457**

Task Monitoring Report

- The Task Monitoring Report identifies what tasks have been created on the *Monitoring of Task* infotype (0019).
- Run the report when analyzing tasks created for a specific period or due to expire.
 - Example: Identify employees who probation period or trial service is to end.
- Access the Task Monitoring Report using the transaction code **S_PH0_48000450**.

The screenshot shows the SAP 'Create Monitoring of Tasks (0019)' transaction. The menu bar includes Infotype, Edit, Goto, Extras, System, and Help. The title bar reads 'Create Monitoring of Tasks (0019)'. Below the title bar, there are icons for document, print, and user. The main form contains the following fields:


Personnel No.	40000019	Name	BRADY-FORST BERNARD
PersArea	4950	Dept of Agriculture	EESubgroup 01
PSubarea	0001	Non Represented	Monthly(M) OT Exempt
		Status	Active

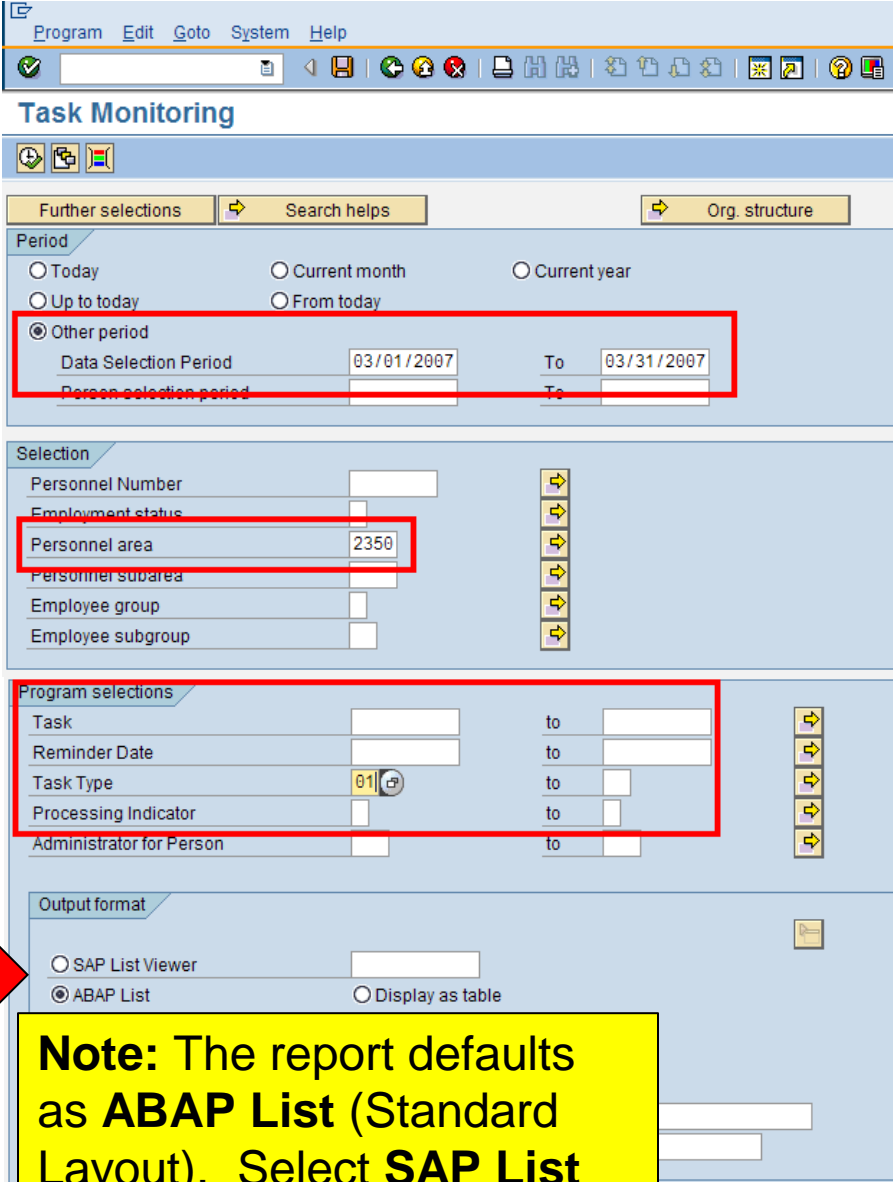
Below the form, there is a 'Task' section with a 'Task Type' dropdown menu. The dropdown menu is open, showing a list of task types:

- 01 Prob per to expire
- 02 Trial Service expire
- 03 In-Training Complete
- 04 Next Appraisal Due
- 05 End of Leave
- 06 Work Permit Expires
- 07 Ecol apptmt end date
- 08 Backgrnd Ck Complete

To the right of the dropdown menu, there is a 'New task' button.

Task Monitoring

- As required, enter or select a Period
- Conditional Selection criteria include:
 - Personnel Number
 - Employment status
 - Personnel area
 - Task
 - Reminder Date
 - Processing Indicator
- When finished, click  (Execute).



Program Edit Goto System Help

Task Monitoring

Further selections Search helps Org. structure

Period

☐ Today ☐ Current month ☐ Current year

☐ Up to today ☐ From today

☒ Other period

Data Selection Period 03/01/2007 To 03/31/2007

Person selection period

Selection

Personnel Number

Employment status

Personnel area 2350

Personnel subarea

Employee group

Employee subgroup

Program selections

Task to

Reminder Date to

Task Type 01 to

Processing Indicator to

Administrator for Person to

Output format

☐ SAP List Viewer

☒ ABAP List

☐ Display as table

Note: The report defaults as **ABAP List** (Standard Layout). Select **SAP List Viewer (ALV)**.

Viewing Results: Task Monitoring

[illegible]

SAP LIST VIEW

ABAP LIST VIEW

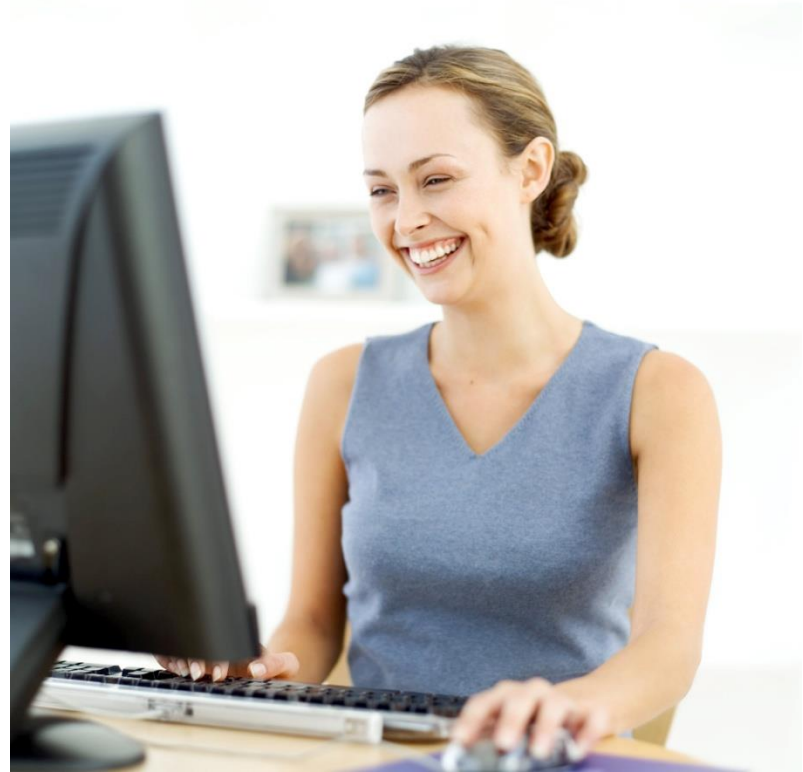
HRMS Activity



**Task Monitoring –
S_PH0_48000450**

Reference Personnel Numbers

- Used to identify employees in the personnel area that have a Reference Personnel Number (two or more personnel numbers) created in HRMS.
- Run the report when analysis on Reference Personnel Numbers is needed.
- Access the report using the transaction code **S_AHR_61016358**.



Reference Personnel Numbers

- As required, enter the Period
- To add additional Selection fields click on the Further Selection option (Personnel Area and Employment Status is currently not displayed)

Program Edit Goto System Help

Reference Personnel Numbers

Further selections Search helps

Period

☐ Today ☐ Current month ☐ Current year

☐ Up to today ☐ From today

☒ Other period

Data Selection Period To

Person selection period To

Payroll period

Selection

Personnel Number

Payroll area

Pers.area/subarea/cost cente

Employee group/subgroup

Additional data

☒ Group by employee

☒ Display detailed information



☒ Highlight changes

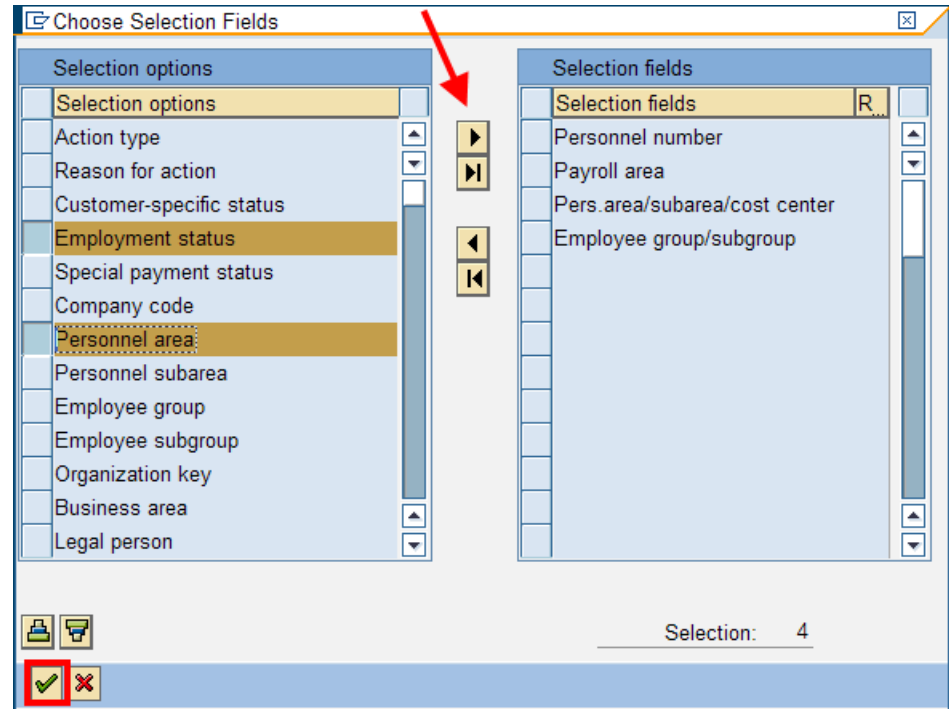
☒ Highlight incorrect data

☒ Display error list


☒ Display statistics list

Reference Personnel Numbers

- From the Selection box, select the desired fields.
 - Employment Status
 - Personnel area
- Click  (Choose) to select the fields.
- Click  (Continue (Enter)).



Reference Personnel Numbers

- Fields to complete:
 - **Employment Status**
 - (3 – Active)
 - **Personnel Area**
 - (3008 – DSHS WSH)
- Click  (**Execute**).

Program Edit Goto System Help

Reference Personnel Numbers

Further selections Search helps

Period

☒ Today ☐ Current month ☐ Current year

☐ Up to today ☐ From today

☐ Other period

Data Selection Period To

Person selection period To

Payroll period

Selection

Personnel Number

Employment status 3

Personnel area 3008

Payroll area

Pers.area/subarea/cost cente

Employee group/subgroup

Additional data

☒ Group by employee

☒ Display detailed information

☒ Highlight changes

☒ Highlight incorrect data

☒ Display error list

☒ Display statistics list

Viewing Results: Reference Personnel Numbers

PerNo.	StaffStatus	Company code	Personnel area	EmplGroup	EmplSubgroup	Empl. %
Data in period from 06/16/2006 to 12/07/2006:						
40000440	3 Active	WA01 STATE OF WASHIN	3024 DSHS Region 4	0 Permane	05 H-OT Elig>40hrs/wk	100.00 %
40000441	3 Active	WA01 STATE OF WASHIN	3000 DSHS Headquarte	0 Permane	00 Hourly (H) OT Exempt	100.00 %
Data in period from 12/08/2006 to 03/15/2008:						
40000440	3 Active	WA01 STATE OF WASHIN	3024 DSHS Region 4	1 Tempora	05 H-OT Elig>40hrs/wk	100.00 %
40000441	3 Active	WA01 STATE OF WASHIN	3000 DSHS Headquarte	0 Permane	00 Hourly (H) OT Exempt	100.00 %
Data in period from 03/16/2008 to 04/15/2008:						
40000440	3 Active	WA01 STATE OF WASHIN	3024 DSHS Region 4	0 Permane	05 H-OT Elig>40hrs/wk	100.00 %
40000441	3 Active	WA01 STATE OF WASHIN	3000 DSHS Headquarte	0 Permane	00 Hourly (H) OT Exempt	100.00 %
Data in period from 04/16/2008 to 12/31/9999:						
40000440	3 Active	WA01 STATE OF WASHIN	3024 DSHS Region 4	0 Permane	05 H-OT Elig>40hrs/wk	100.00 %
40000441	3 Active	WA01 STATE OF WASHIN	3000 DSHS Headquarte	0 Permane	05 H-OT Elig>40hrs/wk	100.00 %

No incorrect personnel numbers found

No incomplete table entries found

Flexible Employee Data Report

- Provides agency users the ability to create their own reports by selecting from a dropdown list of fields designated for end user ADHOC reporting.
- Security authorization to view selected fields will be driven by the end users active security profile. Only authorized employee records and associated infotype fields will be presented in the report.
- HRMS also provides a standard Flexible Employee Data report. This report has the same selection concepts, but provides additional field options. To access the standard report, use transaction code **S_AHR_61016362**.
- Access the customized report using the transaction code **ZHR_RPTPAN02**.

Flexible Employee Data Report – ZHR_RPTPAN02

- Enter a Key Date.
- To add additional Selection fields click on the Further Selection option. (Personnel Area and Employment Status is currently not displayed)

Program Edit Goto System Help

State of Washington Flexible Employee Data Report

Further selections Search helps Sort order Org. structure

Key date

☒ Today

☐ Other keydate

Key Date

Selection

Personnel Number



Data Limiter

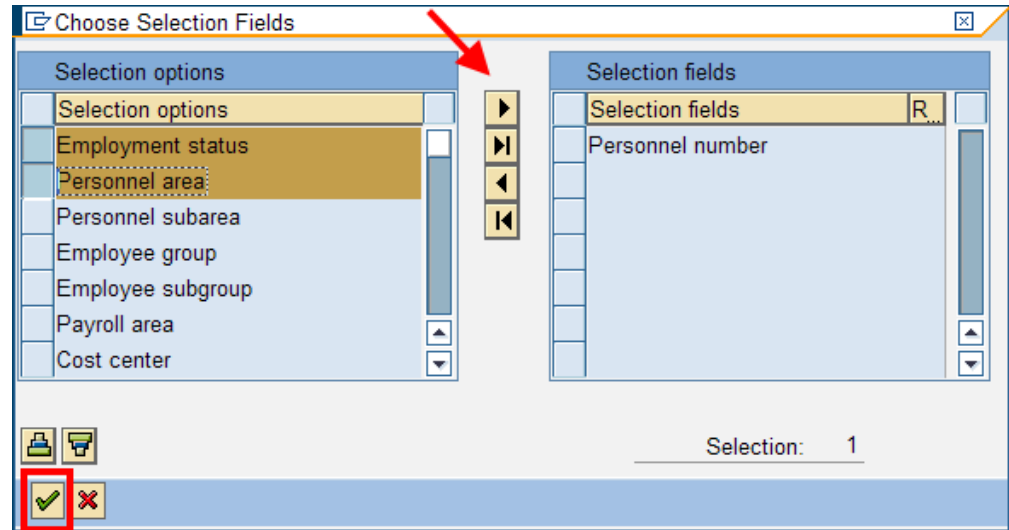
Number of Employees 100

Additional data

Field selection

Flexible Employee Data Report – ZHR_RPTPAN02

- From the Selection box, select the desired fields.
 - Employment Status
 - Personnel area
- Click  (Choose) to select the fields.
- Click  (Continue (Enter)).





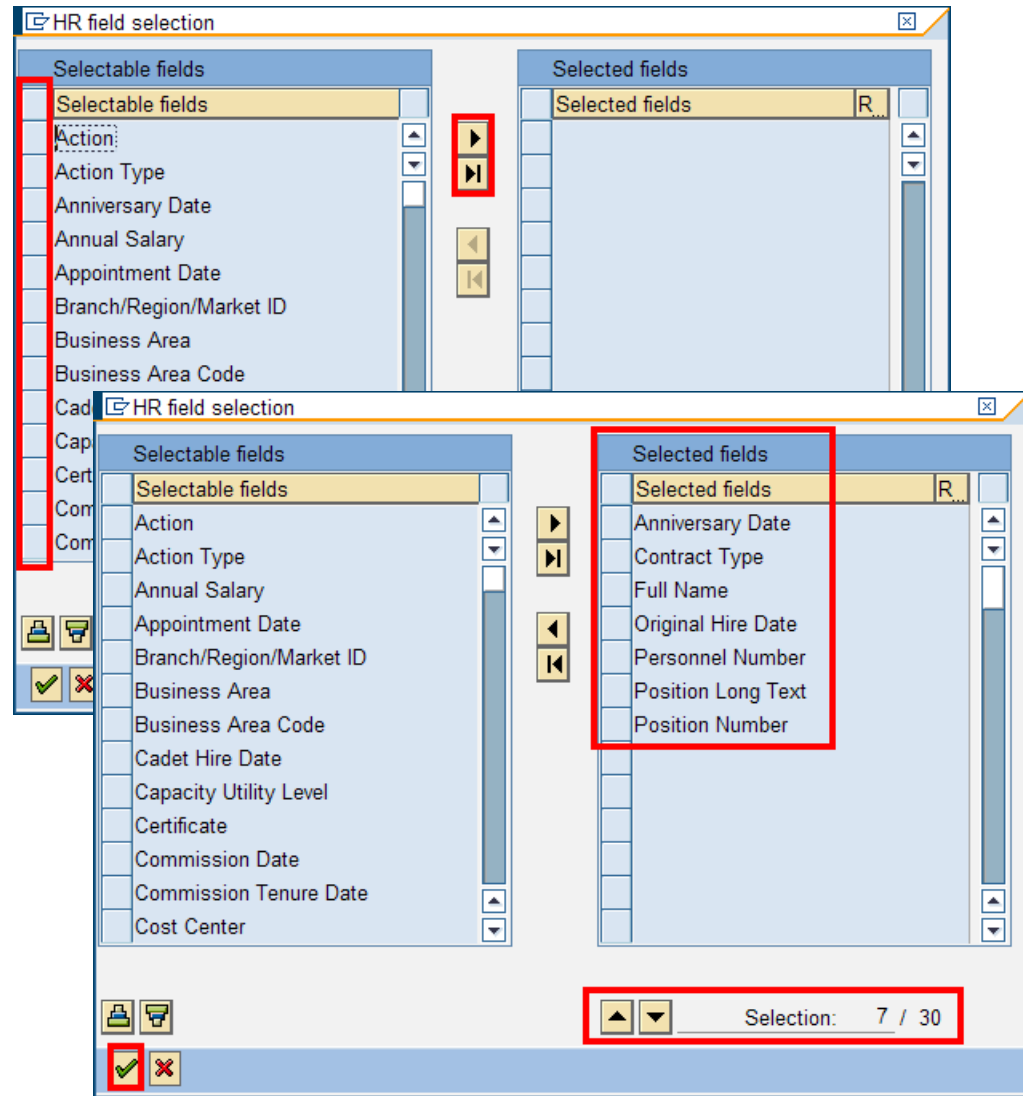
Flexible Employee Data Report – ZHR_RPTPAN02

- In the Additional Data section, select the Field selection to display additional data on the report.

The screenshot displays the 'State of Washington Flexible Employee Data Report' interface. The window has a menu bar with 'Program', 'Edit', 'Goto', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main title is 'State of Washington Flexible Employee Data Report'. Below the title is a section with four buttons: 'Further selections', 'Search helps', 'Sort order', and 'Org. structure'. The 'Key date' section has two radio buttons: 'Today' (selected) and 'Other keydate'. Below 'Other keydate' is a text field labeled 'Key Date'. The 'Selection' section has three rows: 'Personnel Number' with a text field, 'Employment status' with a text field containing '3', and 'Personnel area' with a text field containing '3570'. Each row has a button with a right arrow. The 'Data Limiter' section has a text field labeled 'Number of Employees' with the value '100'. The 'Additional data' section is highlighted with a red box and contains a button labeled 'Field selection'.

Flexible Employee Data Report – ZHR_RPTPAN02

- In the Additional Data section, select the Field selection to display additional data on the report.
- Click on the box to the right of the Selectable fields, then click on the  (choose arrows) to move the selected items to the Selected fields area.
- Click  (**Continue**) to return to the report.




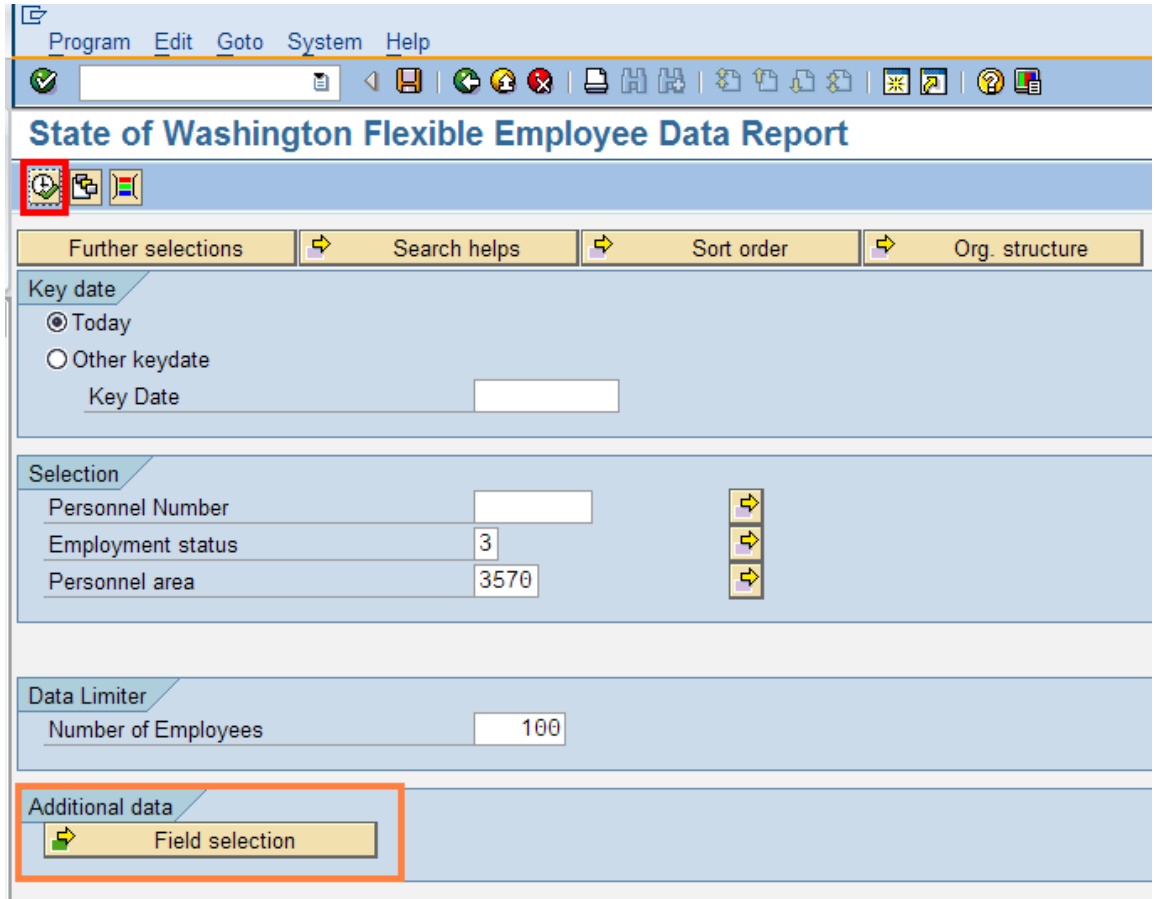
The image displays two screenshots of the 'HR field selection' dialog box, illustrating the steps to select additional data for the report.

Top Screenshot: The 'Selectable fields' list on the left contains various HR fields. A red box highlights the 'Field selection' header in the 'Selectable fields' list. A red box highlights the right arrow button (choose arrows) between the 'Selectable fields' and 'Selected fields' lists.

Bottom Screenshot: The 'Selected fields' list on the right now contains several fields, including 'Anniversary Date', 'Contract Type', 'Full Name', 'Original Hire Date', 'Personnel Number', 'Position Long Text', and 'Position Number'. A red box highlights the 'Selected fields' list. A red box highlights the 'Continue' button (green checkmark icon) and the 'Selection: 7 / 30' indicator at the bottom right.

Flexible Employee Data Report – ZHR_RPTPAN02

- Click  (Execute) to execute the report.



Program Edit Goto System Help

State of Washington Flexible Employee Data Report

Further selections Search helps Sort order Org. structure

Key date

☒ Today
☐ Other keydate
Key Date

Selection

Personnel Number
Employment status 3
Personnel area 3570

Data Limiter

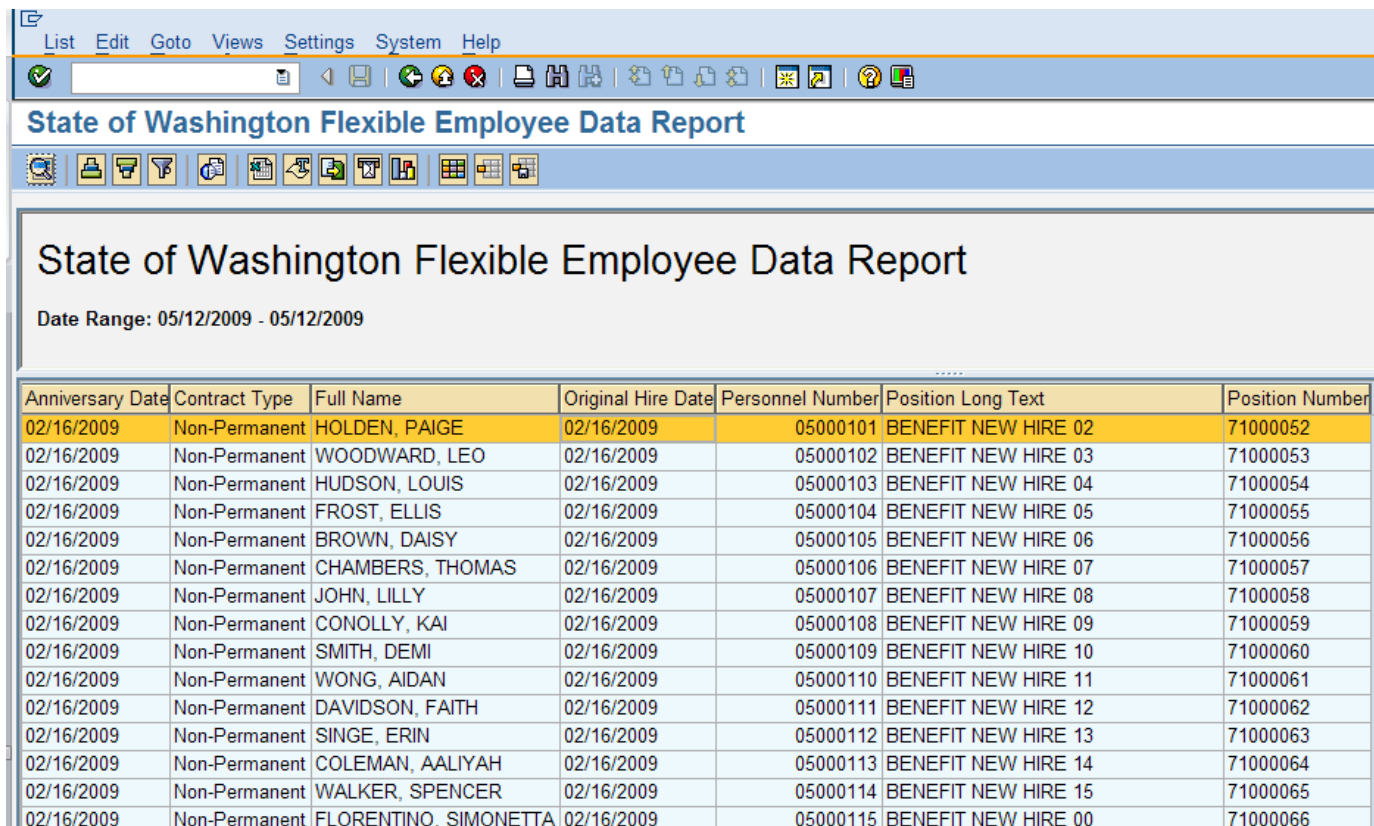
Number of Employees 100

Additional data

Field selection

Viewing Results: Flexible Employee Data Report

- In this example, the report displays the Employee's Contract Type, First Name, Last Name and Personnel Number.



Anniversary Date	Contract Type	Full Name	Original Hire Date	Personnel Number	Position Long Text	Position Number
02/16/2009	Non-Permanent	HOLDEN, PAIGE	02/16/2009	05000101	BENEFIT NEW HIRE 02	71000052
02/16/2009	Non-Permanent	WOODWARD, LEO	02/16/2009	05000102	BENEFIT NEW HIRE 03	71000053
02/16/2009	Non-Permanent	HUDSON, LOUIS	02/16/2009	05000103	BENEFIT NEW HIRE 04	71000054
02/16/2009	Non-Permanent	FROST, ELLIS	02/16/2009	05000104	BENEFIT NEW HIRE 05	71000055
02/16/2009	Non-Permanent	BROWN, DAISY	02/16/2009	05000105	BENEFIT NEW HIRE 06	71000056
02/16/2009	Non-Permanent	CHAMBERS, THOMAS	02/16/2009	05000106	BENEFIT NEW HIRE 07	71000057
02/16/2009	Non-Permanent	JOHN, LILLY	02/16/2009	05000107	BENEFIT NEW HIRE 08	71000058
02/16/2009	Non-Permanent	CONOLLY, KAI	02/16/2009	05000108	BENEFIT NEW HIRE 09	71000059
02/16/2009	Non-Permanent	SMITH, DEMI	02/16/2009	05000109	BENEFIT NEW HIRE 10	71000060
02/16/2009	Non-Permanent	WONG, AIDAN	02/16/2009	05000110	BENEFIT NEW HIRE 11	71000061
02/16/2009	Non-Permanent	DAVIDSON, FAITH	02/16/2009	05000111	BENEFIT NEW HIRE 12	71000062
02/16/2009	Non-Permanent	SINGE, ERIN	02/16/2009	05000112	BENEFIT NEW HIRE 13	71000063
02/16/2009	Non-Permanent	COLEMAN, AALIYAH	02/16/2009	05000113	BENEFIT NEW HIRE 14	71000064
02/16/2009	Non-Permanent	WALKER, SPENCER	02/16/2009	05000114	BENEFIT NEW HIRE 15	71000065
02/16/2009	Non-Permanent	FLORENTINO, SIMONETTA	02/16/2009	05000115	BENEFIT NEW HIRE 00	71000066

Flexible Employee Data Report



■ Review OLQR User Procedures for:

- Flexible Employee Data
- Flexible Employee Data Report Indirect Value
- Flexible Employee Data

HRMS Activity



**Flexible Employee Data Report –
ZHR_RPTPAN02**

Periodic Increment and Longevity Increase Projection Report

- Used to display current Pay Scale data and to project new Pay Scale data for periodic increment and longevity increases .
- Access the report using the transaction code **ZHR_RPTPA803**.



Periodic Increment and Longevity Increase Projection Report

- Complete the following fields:
 - **Personnel area**
 - **Business area**
- Choose a report type:
- Click **(Execute)** to execute the report.



Program Edit Goto System Help

Periodic Increment and Longevity Increase Projection Report

Further selections Search helps Sort order Org. structure

Period

☒ Today ☐ Current month ☐ Current year
☐ Up to today ☐ From today
☐ Other period
Period To

Selection

Personnel Number	<input type="text"/>	<input type="button" value="→"/>
Employment status	<input type="text" value="0"/>	<input type="button" value="→"/>
Organization key	<input type="text"/>	<input type="button" value="→"/>
Business area	<input type="text"/>	<input type="button" value="→"/>
Work contract	<input type="text"/>	<input type="button" value="→"/>
Organizational unit	<input type="text"/>	<input type="button" value="→"/>
Position	<input type="text"/>	<input type="button" value="→"/>
Job	<input type="text"/>	<input type="button" value="→"/>

Additional data

Planned compensation type	<input type="text" value="T"/>	<input type="button" value="→"/>
Pay scale type	<input type="text"/>	to <input type="text"/>
Pay Scale Area	<input type="text"/>	to <input type="text"/>
Pay scale group	<input type="text"/>	to <input type="text"/>
Pay scale level	<input type="text"/>	to <input type="text"/>
<input type="checkbox"/> Display missed PID / Longevity		

Data Format


Layout

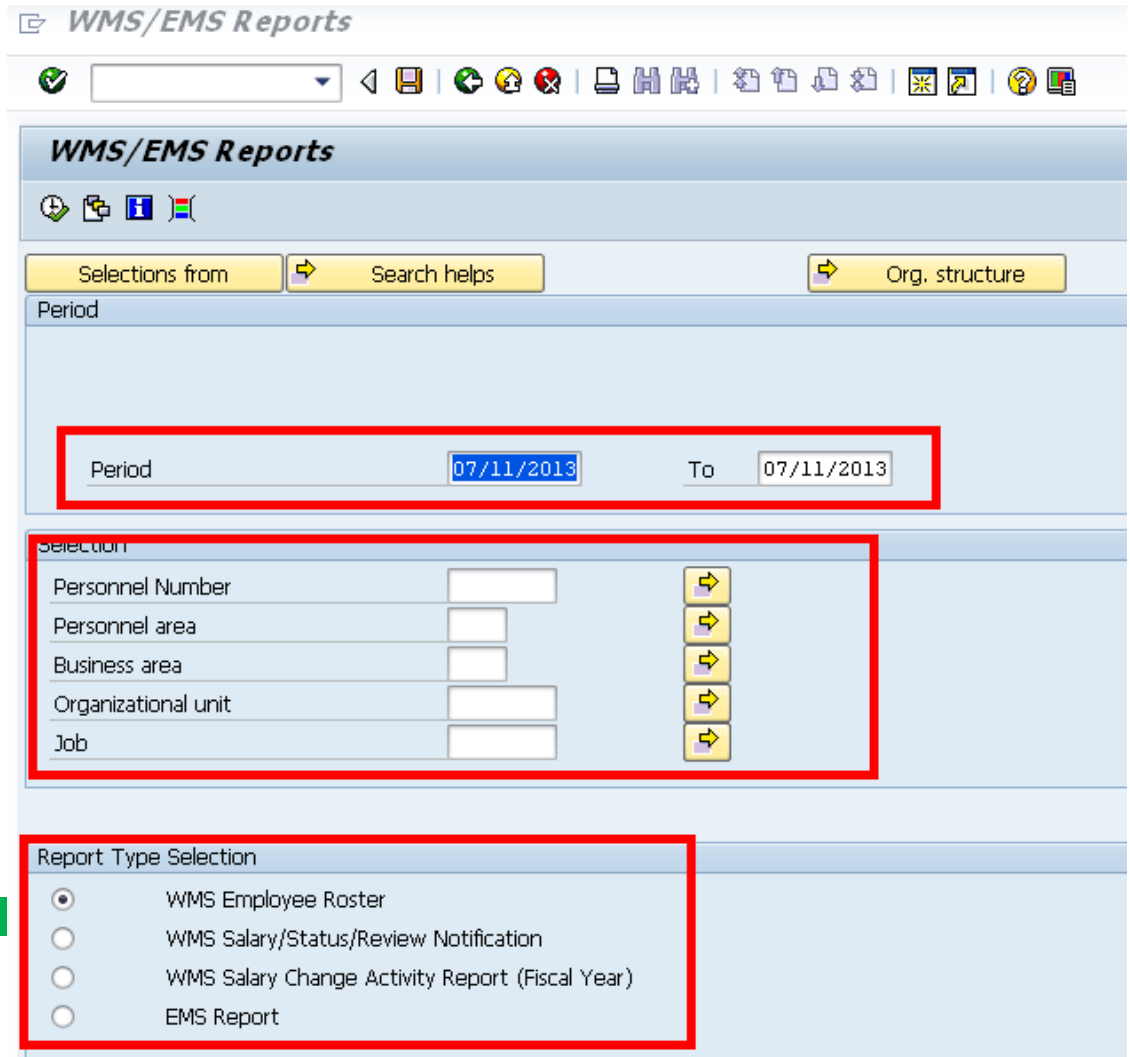
WMS/EMS Reports

- Used to identify WMS employees in the agency as well as their salary, status and review notification.
- Access the report using the transaction code **ZHR_RPTPA802**.



WMS/EMS Reports

- As required, enter the Period
- Conditional selection criteria include:
 - **Personnel area**
 - **Business area**
- Choose a report type:
 - **WMS Employee Roster**
 - **WMS Salary/Status/Review Notification**
 - **WMS Salary Change Activity Report (Fiscal Year)**
 - **EMS Report**
- Click  (**Execute**) to execute the report.



WMS/EMS Reports

Selections from Search helps Org. structure

Period

Period 07/11/2013 To 07/11/2013

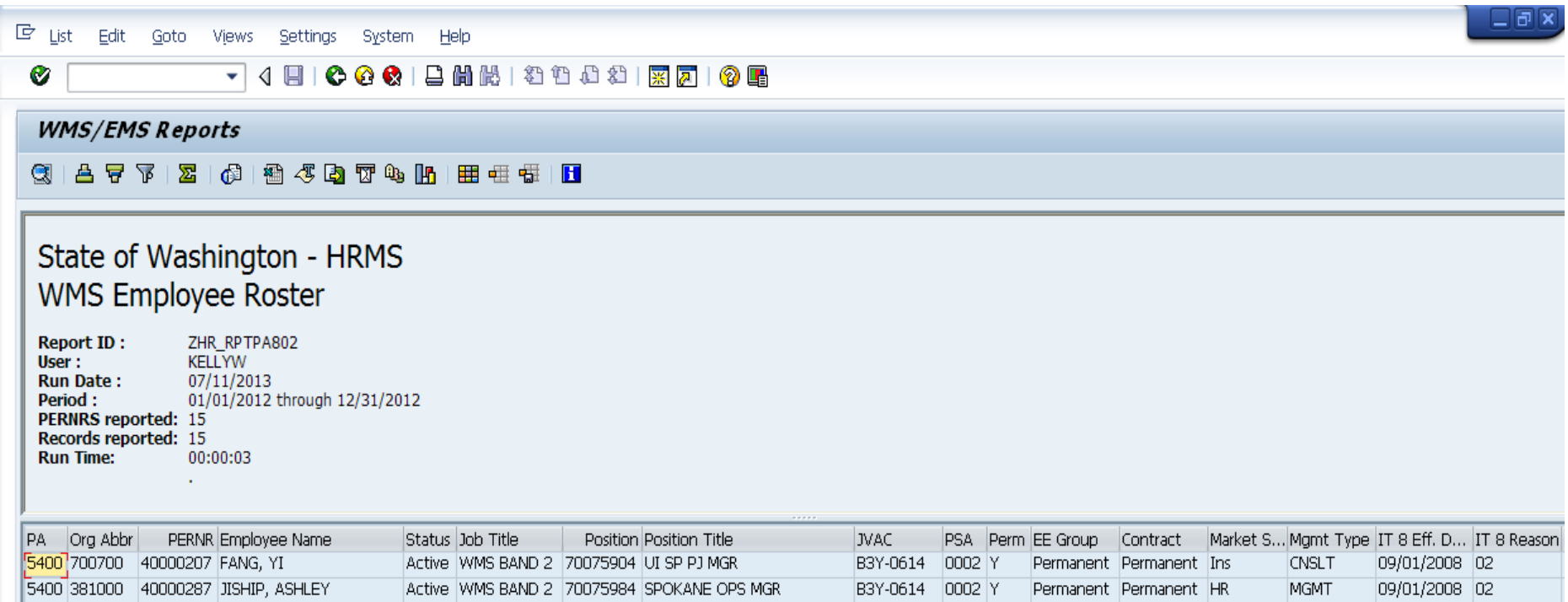
Selection

Personnel Number		
Personnel area		
Business area		
Organizational unit		
Job		

Report Type Selection

- ☒ WMS Employee Roster
- ☐ WMS Salary/Status/Review Notification
- ☐ WMS Salary Change Activity Report (Fiscal Year)
- ☐ EMS Report

Viewing Results: Washington Management Services Reports



WMS/EMS Reports

State of Washington - HRMS
WMS Employee Roster

Report ID : ZHR_RPTPA802
User : KELLYW
Run Date : 07/11/2013
Period : 01/01/2012 through 12/31/2012
PERNRS reported: 15
Records reported: 15
Run Time: 00:00:03

PA	Org Abbr	PERNR	Employee Name	Status	Job Title	Position	Position Title	JVAC	PSA	Perm	EE Group	Contract	Market S...	Mgmt Type	IT 8 Eff. D...	IT 8 Reason
5400	700700	40000207	FANG, YI	Active	WMS BAND 2	70075904	UI SP PJ MGR	B3Y-0614	0002	Y	Permanent	Permanent	Ins	CNSLT	09/01/2008	02
5400	381000	40000287	JISHIP, ASHLEY	Active	WMS BAND 2	70075984	SPOKANE OPS MGR	B3Y-0614	0002	Y	Permanent	Permanent	HR	MGMT	09/01/2008	02

Note: Not a complete screen shot of the report.

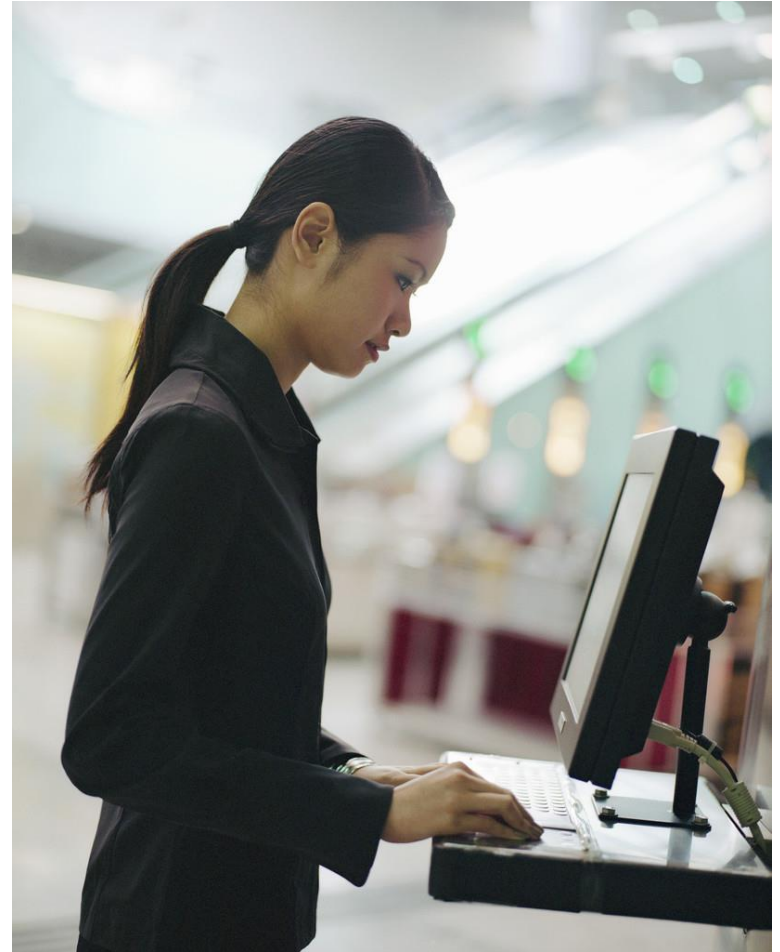
HRMS Activity




WMS/EMS Reports – ZHR_RPTPA802

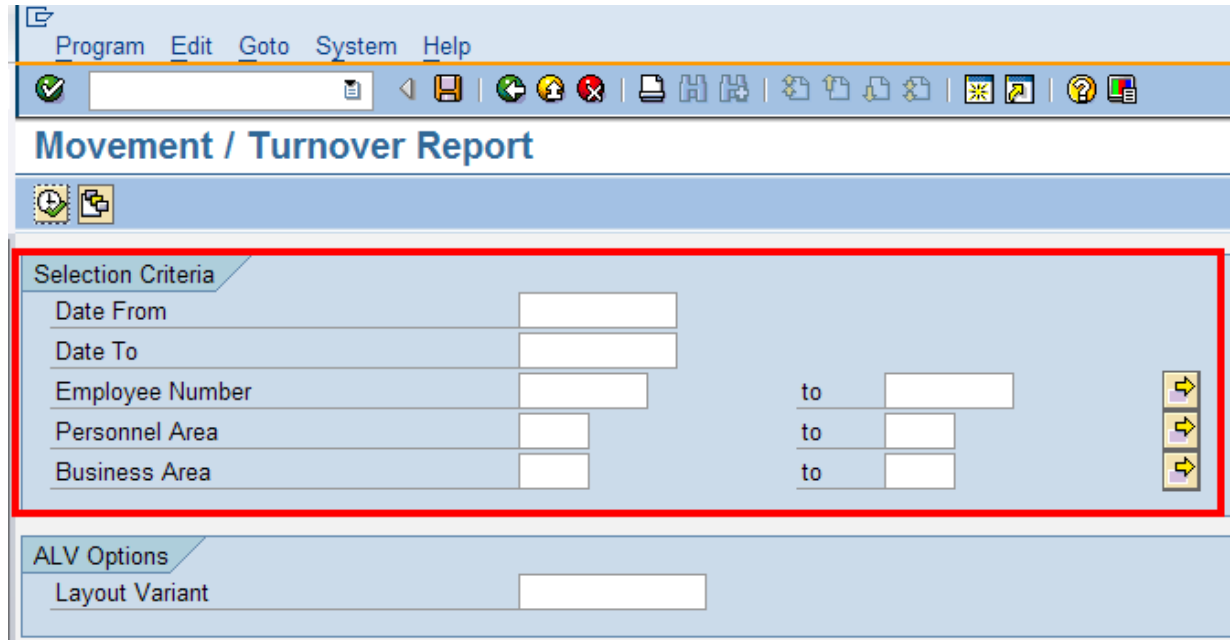
Movement – Turnover Report

- Used to identify employees who have left an agency or sub-agency (Business / Personnel Area); have been hired into the agency or sub-agency (Business / Personnel Area); or who have moved into another sub-agency (Personnel Area) within the agency (Business Area)
- Run the report when analysis on new hires is needed.
- Access the report using the transaction code **ZHR_RPTPYU26**.



Movement – Turnover Report

- Conditional selection criteria include:
 - **Date From**
 - **Date To**
 - **Personnel Area**
 - OR
 - **Business Area**
- Click  **(Execute)** to execute the report.



Program Edit Goto System Help

Movement / Turnover Report

Selection Criteria

Date From			
Date To			
Employee Number		to	
Personnel Area		to	
Business Area		to	

ALV Options

Layout Variant	
----------------	--

Viewing Results: Movement – Turnover Report

SAP

List Edit Goto Views Settings System Help

Movement / Turnover Report

State of Washington
Movement/Turnover Report

Program: ZHR_RPTPYU26
User: JANETP
Run Date: 05/12/2009

Employee ...	Employee Name	Old Pers. Area	New Pers Area	Old Business ...	New Business...	Begin Date	End Date	Action	Action Description	Reason	Reason Description
5000000	CROSS, JASON		3000		3000	09/01/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000208	LAI, MENG	5400	5400	5400	5400	10/01/2008	12/31/9999	U5	Separation	23	Retirement
40000371	SATO, SEIKA		4650		4650	09/01/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000480	HOPKINS, ELIJAH		1000		1000	09/22/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000483	CORNWELL, JOHN	4050	4050	4050	4050	09/16/2008	12/31/9999	U6	Rehire	23	Non-Perm. Limited
40000494	MCCARTHY, ALMA	3008	3051	3000	3050	09/01/2008	12/31/9999	U6	Rehire	15	Reemployment

Note: The report allows you to go directly into the employee's HR Master Data by double-clicking on the employee's record in the report results.

Viewing Results: Movement – Turnover Report

List Edit Goto Views Settings System Help					
Movement / Turnover Report					
State of Washington Movement/Turnover Report					
Program: ZHR_RPTPYU26 User: JANETP Run Date: 05/12/2009					
Job Class	Job Class Short Text	Job Class Long Text	Old Job Class	Old Job Class Short	Old Job Class Long T
50000274	100J	OFF ASST 3			
50003923	WMS03	WMS BAND 3	50003923	WMS03	WMS BAND 3
50001206	389A	PARK RANGER 1			
50001362	429C	AGO INVESTIGATOR/ANALYST			
50002552	530P	TRANSPORTATION TECHNICAL ENGINEER 5	50002552	530P	TRANSPORTATION TECHNICAL ENGINEER 5
50000902	286B	LPN 2	50002065	286E	PSYCHIATRIC SECURITY NURSE

HRMS Activity



**Movement Turnover Report –
ZHR_RPTPYU26**

WMS Activity Reports

- Used to identify and monitor WMS positions and activities within the agency.
- 6 Reports within one
 - Established WMS Positions
 - Abolished WMS Positions
 - Reallocated from WMS Positions
 - Re-Evaluation of existing WMS Positions
 - WMS Positions
- Access the report using the transaction code **ZHR_RPTOMN03**.



WMS Activity Reports

- As required, enter the Period

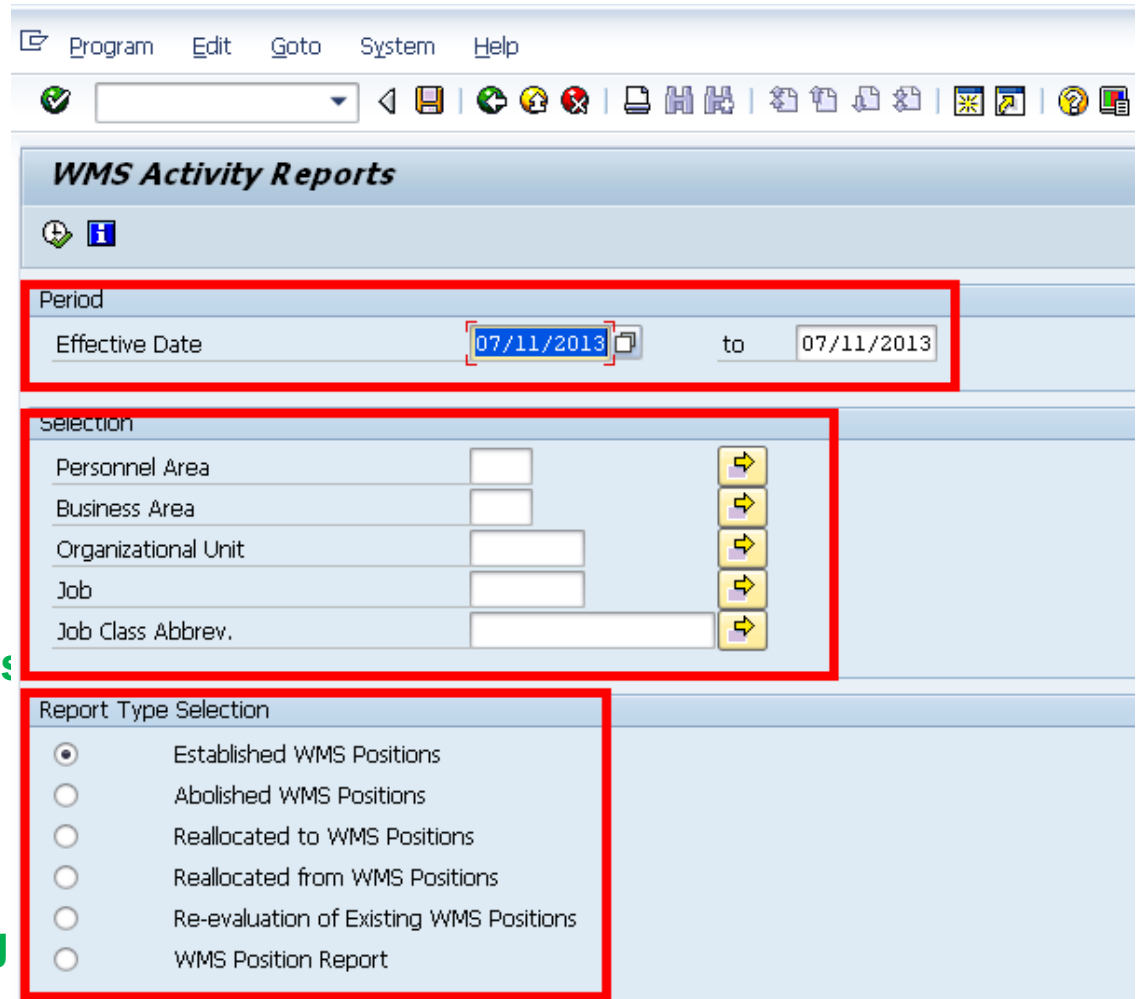
- Conditional selection criteria include:

- Personnel area
- Business area

- Choose a report type:

- Established WMS Positions
- Abolished WMS Positions
- Reallocated to WMS Positions
- Reallocated from WMS Positions
- Re-evaluation of Existing WMS Positions
- WMS Position Report

- Click  (**Execute**) to execute the report.








Program Edit Goto System Help

WMS Activity Reports

Period

Effective Date 07/11/2013 to 07/11/2013

Selection

Personnel Area	<input type="text"/>	
Business Area	<input type="text"/>	
Organizational Unit	<input type="text"/>	
Job	<input type="text"/>	
Job Class Abbrev.	<input type="text"/>	

Report Type Selection

- ☒ Established WMS Positions
- ☐ Abolished WMS Positions
- ☐ Reallocated to WMS Positions
- ☐ Reallocated from WMS Positions
- ☐ Re-evaluation of Existing WMS Positions
- ☐ WMS Position Report

Washington Management Services Reports

WMS Activity Reports

State of Washington - HRMS
Established WMS Positions

Report ID : ZHR_RPTOMN03
User : KELLYW
Run Date : 05/07/2013
Period : 07/01/2011 through 07/31/2011
Records reported: 13
Run time: 00:00:00

Position	Effective Date	Organization Unit	Org Unit Description	Position Title	Position...	Job Cl...	Job Cla...	Pay Gra...	Market Segment
71025952	07/01/2011			CHIEF FINANCIAL OFFICER	0057			BAND 3	
71024751	07/01/2011	31007775	SMALL AGENCY HR	WMS02 HR CLIENT SERVICES MANAGER	0439			BAND 2	HR
71024817	07/01/2011			ADMIN OPERATIONS MANAGER	0367			BAND 2	

Note: Not a complete screen shot of the report.

Summary

- Throughout the course, you have learned to:
 - Understand Personnel Administration Activities.
 - Hire and rehire an employee.
 - Display and change employee information.
 - Process an Employee Appointment Change.
 - Process a Leave of Absence.
 - Perform an Employee Separation.
 - Access Personnel Reports.
 - Access procedures in the OLQR.

Summary

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HRMS Resources

■ The following resources are available for your use:

- DES Service Center– (360) 664–6400
 - ServiceCenter@DES.wa.gov
- The Data Warehouse – <http://dwsecure>
- The On-Line Quick Reference
 - <http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/>
- HRMS Support Website
 - <http://www.hr.wa.gov/payroll/HRMS/HRMSSupport/Pages/default.aspx>
- HRMS Data Definitions
 - <http://pub/payroll/HRMS/OnLineQuickReference/Pages/DataDefinitions.aspx>

Other OLQR User Procedures

- Here is a list of other OLQR User Procedures that have not been mentioned in the course:
 - [Addresses](#)
 - [Assign Badge Number](#)
 - [Basic Pay – Change Pay Scale to Pay Band \(Salary\)](#)
 - [Maintain Name Change](#)
 - Military Service – Create
 - Military Service – Maintain
 - Monitoring of Tasks – Create and Maintain



On-line Quick Reference

OLQR is an acronym for the On-line Quick Reference tool.

It contains a glossary, job aids, system and user procedures that describe how to perform HRMS tasks step-by-step.

The screenshot shows the Washington State Department of Personnel's On-Line Quick Reference (OLQR) website. The header includes navigation links: Contact DOP, About Us, Topic Index A-Z, Forms, Publications, and Calendar. The main navigation bar features buttons for Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. A search bar with a 'GO' button is located in the top right. The left sidebar lists 'Payroll - HRMS' with sub-links for HRMS Support, Payroll Calendars & Schedules, Training, and On-Line Quick Reference. The main content area is titled 'On-Line Quick Reference' and describes the tool's purpose: to help users perform day-to-day tasks in the Human Resource Management System (HRMS). It lists the organization by functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and a glossary. A 'Related Documents' section links to 'HRMS Upgrade Impacts'. A 'Contact Us' section provides the phone number 360-664-6400 and an email link. The page is updated as of 3/9/09.

Washington State Department of Personnel

Home Strategic HR Compensation & Job Classes Training Recruitment Rules Diversity Payroll More DOP Services

Payroll - HRMS

HRMS Support
Payroll Calendars & Schedules
Training
On-Line Quick Reference

On-Line Quick Reference

The On-Line Quick Reference (OLQR) contains instructional materials to help you perform day-to-day tasks in the Human Resource Management System (HRMS).

It is organized by functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and glossary.

- [Functional Areas and Roles](#)
- [Job Aids](#)
- [HRMS Reports](#)
- [User Procedures](#)
- [Course Manuals](#)
- [Glossary](#)

Updated: 3/9/09

Related Documents
[HRMS Upgrade Impacts](#)

Contact Us
360-664-6400 or [E-Mail](#)

website address: <http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference>